User’s Manual

Version 6.1

08/24/2006

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Chapter 1

Introduction

WebZerve tracks URL names and information about an organization's web pages. It maintains information identifying the Content Manager and the responsible organization and enables the Webmaster, Content Managers, and Web Developers to view web page information, update information, conduct audits, and add new web sites and pages to the underlying web site database. The system also tracks and handles request process initiated by content managers to add or modify web pages. Various reports are generated based on tracked information.

WebZerve is organized into ten sections, including Content, Reports, Site Profile, Audit, Request, Meta Tags, Fast Tag, Yellow Pages, Utilities, and Administration. This manual walks you through the process of using WebZerve section by section.

Login

Your System Administrator will provide you with a link and login information to WebZerve application. Type your USER ID and PASSWORD and click ENTER. The system is able to automatically determine the login user's role based on your USER ID. The system uses following roles. Content Manager, Web administrator, Developer, Auditor, 508 Reviewer, system administrator. (Web Administrator is sometimes referred as Webmaster. If a user has more than one role the most used role is set as the default role.

Figure1. Login Page

Chapter 2

Content

A primary function of WebZerve is tracking, examining, and evaluating information on web pages. The system will display the Content Page at login.
The content page also serves as a space for displaying any Web announcements made by Web Administrator. Access level determines the available tabs. If you have Administrator's rights, you may access all options. The Administrator tab is visible only if you have Administrator rights. Click on Content to display the content options.

From this screen you can search for and examine web pages in 3 ways:
Keyword Search: Type words related to the URL of interest in the blank field at the top of the screen. Click the Keyword button. This will display a list of web pages that contain the search words.
URL Search: Type the URL name in the text box and click the URL button. This will display a list of website names that match your search criteria. The URL Search will also search on partial URLs.
Title Search: Type the title of the document you are looking for and click the Title button. This will display the web page that contains the named document.
Note: Identical search capabilities are available from any screen in the application.

Figure 2 search result page

Figure 3 illustrates a sample list of web pages generated by a search. To view the actual document (web page) click on the web page link. Click the icon in View column to display the profile of the web page. From the profile screen a user can edit the profile. You can navigate from one listed page to another by using the Next/Last links.

Add: To add a new URL, click on the Add button.

Log Off: To exit, click Log Off

Figure 3: Content URL Search Result

Content Profile

Clicking the URL View button opens up the Content Profile screen illustrated in Figure 4.

Web Page: Displays a link to the URL of the web page. Click on the link to open the web page in a new window. This field cannot be edited.

Responsible Organization: Name of the Organization that is responsible for maintaining the web site. This field is generated by the application depending on the responsible Content Manager and his or her organization.

Created Date: Date when webpage was created. This field cannot be edited.

Last Updated Date: Today's date. - Editable Type in the date manually or click (mm/dd/yyyy) link to open the calendar. Select the desired date from the calendar to insert the date in Last Updated Date field. Click on the Today link to insert today's date. If you have second thoughts, click the Reset link to reset the date.

Next Review Date: Automatically generated by the application nine months from the created date. This field can be edited manually, by invoking the calendar, or by clicking the Extend Next Review link to automatically extend the date.

Expiration Date: Automatically generated by the application eighteen months from the created date. This field can be edited manually, by invoking the calendar, or by clicking the Extend Expiration link to automatically extend the date.

Content Manager: Displays the default Content Manager names. This field can be edited. Scroll down to see a dropdown list of available Content Managers.

Developer: Displays the default Developer names. This field can be edited. Scroll to see a dropdown list of available Developers.

Remarks:

Assigned Meta tags:

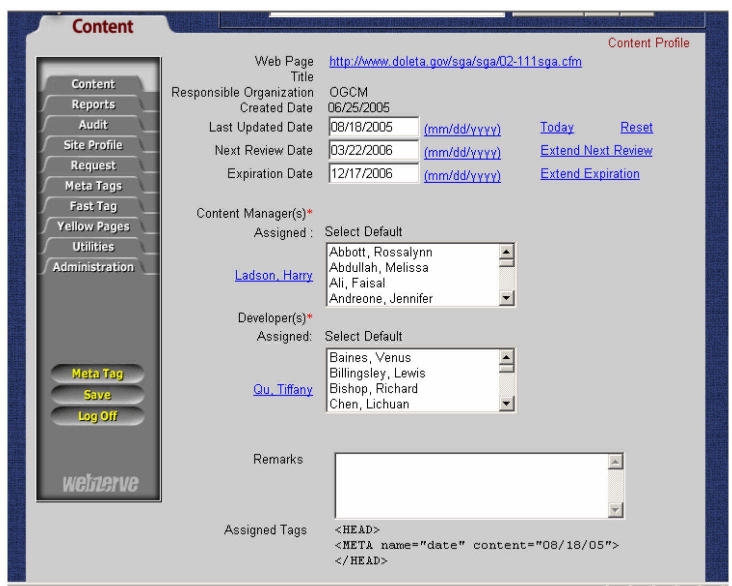


Figure 4 Web page profile

Content – URL – Add

When you click the Add button on the content screen or the Search Result screen you will see the Content – URL– Add screen as illustrated in Figure 5.To add a new URL on this screen: **URL:** Type the new URL name.
Content Manager: Select the desired Content Manager(s) from the list box.
Developer: Select the desired Developer(s) from the list box.
Created Date: is today's date by default. This date can be edited.
Remarks: Put your comments here.
URL, Content Manager, Developer and Created Date are required fields.
Save: To save your data to the database, click Save.
Cancel: To cancel your changes, click Cancel.

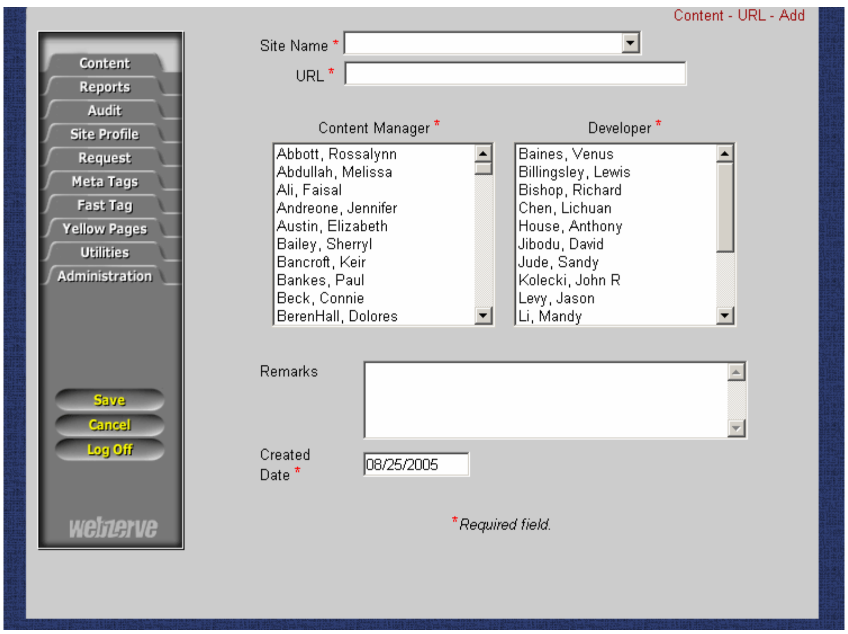


Figure 5 URL add screen

Chapter 3

Reports

When you click the Reports tab, the screen illustrated in Figure 6 displays. Following reports can be run from here.
URL Reports, Audit Module reports, URL Custom Reports, Request Module Reports and Site Reports. Select report type will take you to the main page of that report.

Figure 6 Reports main menu

URL Reports:

Figure 7 displays the main menu for URL Reports. URL reports display list of URL's along with the selected date criteria sorted in descending order.
By choosing the radio button next to the desired report, WebZerve will automatically generate a preformatted, predefined URL report.

Next Review: Will automatically generate a report on all assigned URLs, sorted in ascending order by Next Review date, including the name of the Content Manager and the Developer for each page. By choosing the radio button in front of Content Manager, the report will be sorted by Content Manager, and then by URL in ascending order. The same holds true for the two other radio buttons; Developer and Site. Use the drop down lists to make

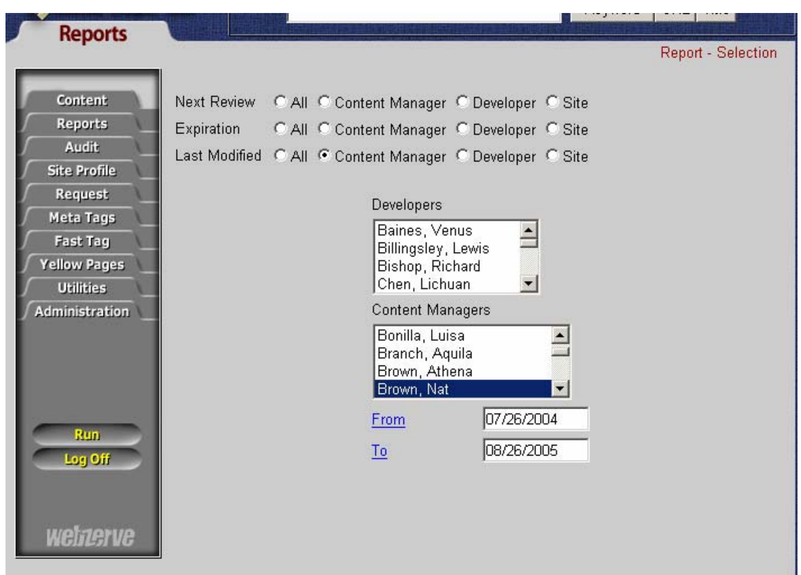


Figure 7 URL Reports main menu

selections from the list of Content Managers and Developers. Multiple selections can be made by using the keyboard CTRL key.
Expiration: generates a report on all assigned URLs, sorted in descending order by expiration date.
Last Modified: generates a report on all assigned URLs, sorted in descending order by last modified date.
From & To: are date delimiters. You can constrain the information in the report to any segment of time by using the date delimiters. Click the From and To links to open calendars and select pertinent dates. If no date is selected the report is run for all the time period in the database.
Click Run to display the report. See Figure 8 for an example.

Report Screen
Report screens for all report types and styles have features similar to the Sample Report displayed in Figure 8.

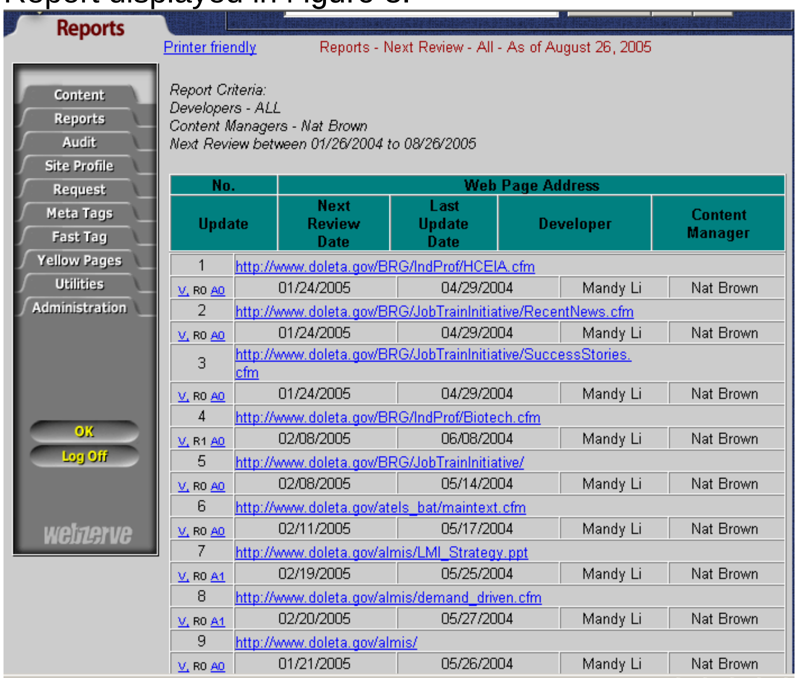


Figure 8 Sample Report

Across the top of the screen is the description of the report constraints. For the sample shown in Figure 8 the report contains all Developers and all Content Managers for every page in the database with a Next Review Date occurring on or before the day the report was generated. This constraint is because the type of report selected was Next Review, All.

Beneath the report description is the report table. The header rows of the report depict the arrangement of the report data.

Click a URL link to view the Web Page. The web page will open in a new window.

To print a report, click the Printer Friendly link in the top left hand corner.
This will open up a new browser window with the report (in black and white) then click on the Print button in the top left hand corner and the report will be printed.

Click the 'V' in the first column of the sample report page to access the content profile for the specific URL (Refer to Figure 8). You are able to edit the content profile for this web page, refer to Figure 4. Use the Save button to save any changes. The changes will not be reflected in the Report until the database is refreshed.
The R, followed by a number, shows number of requests filed to update the page. If no number then there are no change requests.
The 'A' followed by a number, shows how many audits have included

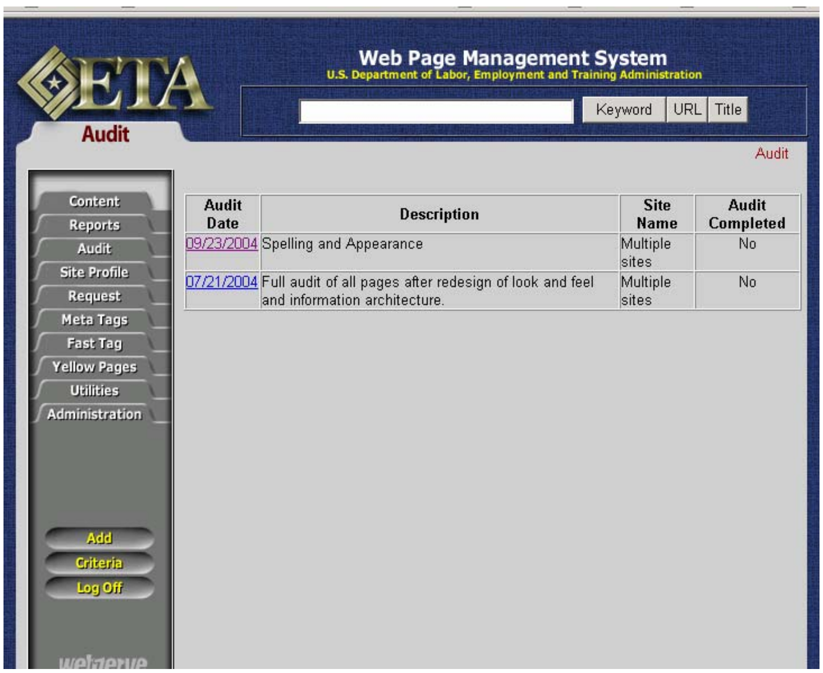


Figure 9 audit page

this page in the audit sample. When you click on the A, a new screen will open for the Audit home page, as illustrated in Figure 9, depicting the audits that have included this page in the audit sample, and for which audit results are available.
The other data included in the report will vary, based on the information requested.

Audit Module Reports/Audit Error Report

From the Reports – Main Menu – Selection screen shown in Figure 6, click Audit Module Report to open a report of a web page evaluation. The screen illustrated in Figure 10 will display:

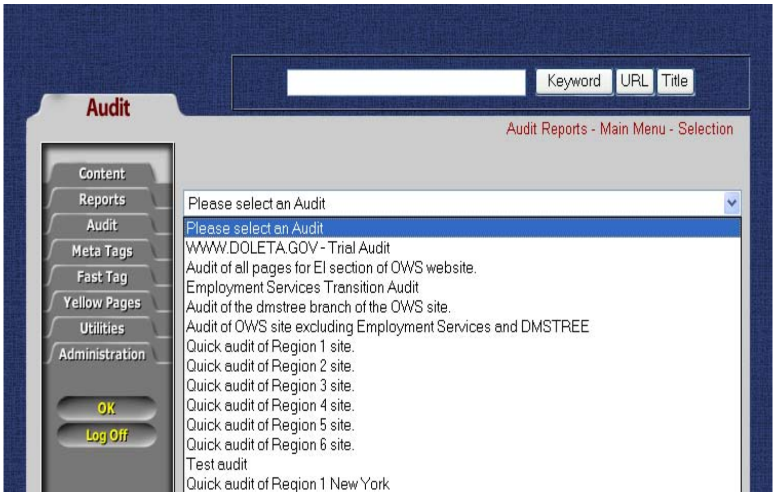


Figure 10 audit reports main screen

The Audit – Report – Selection page comes up. The drop down list reveals categories for all audits that have been conducted on the website. Select an audit category, click on OK. Following screen will be displayed.

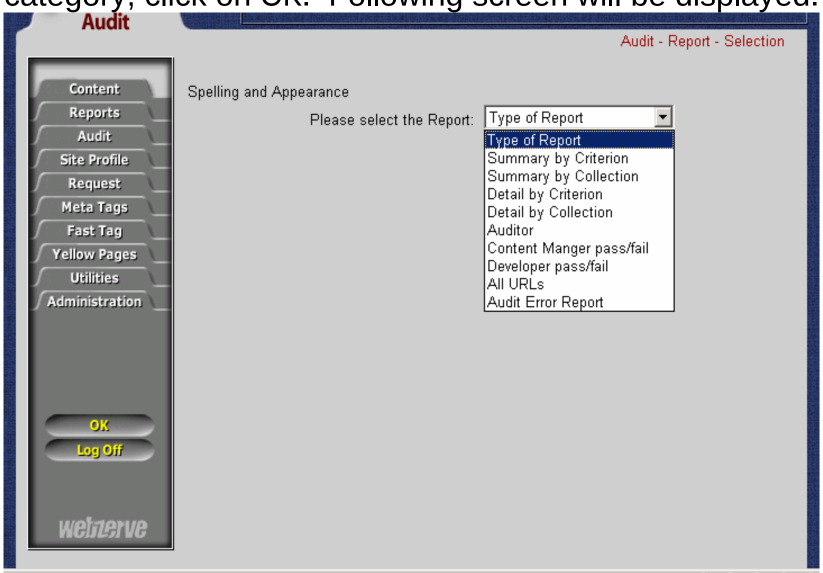


Figure 11 Audit Report selection screen

The audit reports generated are:

i) Summary by Criterion - shows each audit criterion, the average number of non-compliances found per page assessed, the number of pages found for which the criterion was not applicable, and the percentage of pages found with at least one incident of non-compliance.
ii) Summary by Collection – shows the total number of URLS audited and the % and number of pages passed.
iii) Detail By Criterion – shows the average score, result count, result percentage for selected Criteria
iv) Detail by Collection - shows the average score, result count, result percentage for Collection (all Criterias)

v) Auditor – shows the auditors name, number of urls audited in the site and the status if audit complete or incomplete

vi) Content Manager pass/fail – shows the names of content managers for the site and the number of urls passed or failed.

vii) Developer pass/fail – shows the names of developers for the site and number of urls pass or failed

viii) All Urls - shows urls names that are in audit process, audit status(pending or completed), if audit passed or failed and if there is history of audit

ix) Audit Error Report - This is an important report which is generated by Content Managers after the audit of a site is completed and there are errors to fix on the pages. This report shows the audited page, Type of Criteria violated, detail description of error in the Comment field. NOTE: Content Managers can run only the Audit Error Report in the Audit Reports so when they click on Reports module They will see Audit Error Report instead of Audit Module Reports illustrated in figure 6 'Reports Main Menu'

Custom Reports

Main Menu

Figure 12 illustrates the main page for generating custom reports. This feature of WebZerve allows the user to select and report on selected criteria. The URL for the page is ALWAYS reported in the custom report; only the other criteria can be specifically selected.

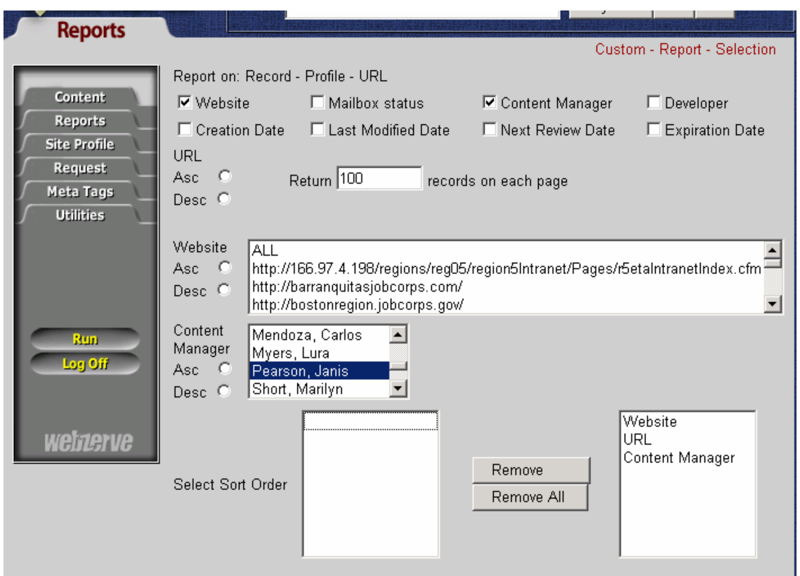


Figure 12 Custom Report main menu

When a specific criterion is selected, the screen will refresh and the selected criterion will appear below the header list. Each individual criterion permits the user to indicate which specific attributes are desired for the report, and whether the information should be presented in ascending or descending order

The default for each criterion is to display all attributes in ascending order.

Sample custom report is illustrated in Figure 13 below

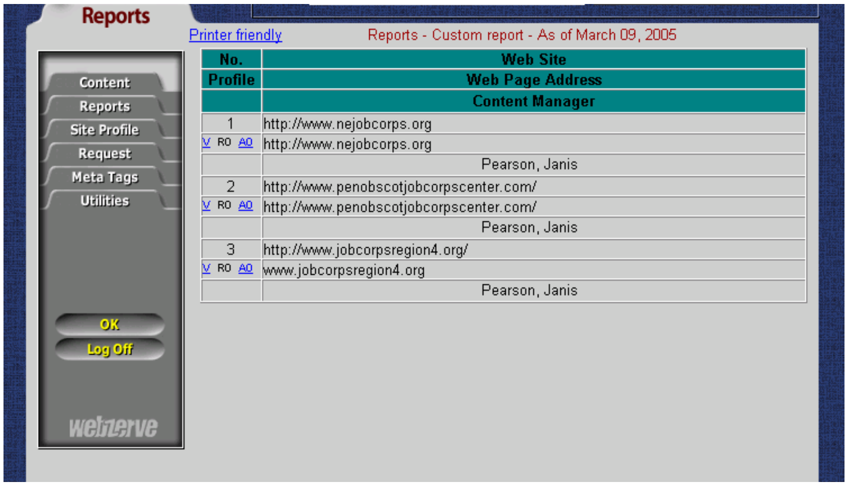


Figure 13 sample custom report

Request Module Reports

Following is the main screen for generating reports based on the request module. It works the same way as the Custom Report. It generates reports giving the statistics on the number of requests completed by content managers, developers, auditors and Web administrators. It also shows the average time taken to complete the request.

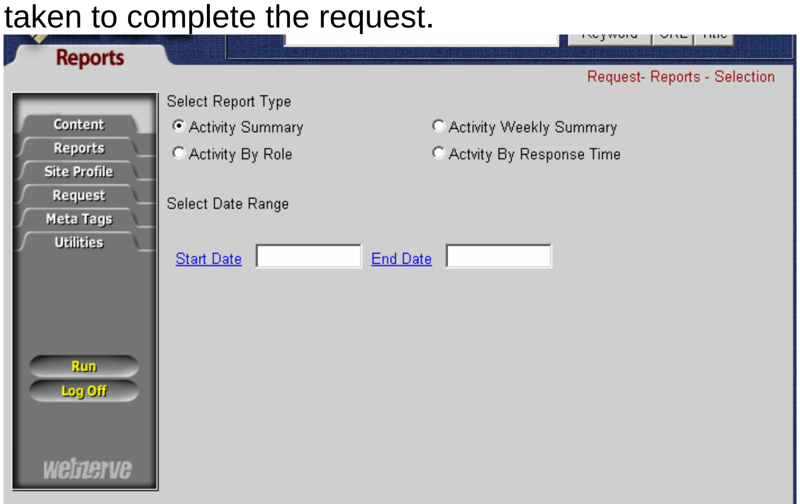


Figure 14 Request Reports – Main Menu

There are four types of reports.

i.) Activity Summary – shows the number of Requests Received, Requests Forwarded and Requests in Process for each role for the period specified. If no dates are selected will generate a report for data since the start of the application. Sample Activity report illustrated in Figure 15. To print the report click Print button. Select the printer and number of copies to be made and click ok.

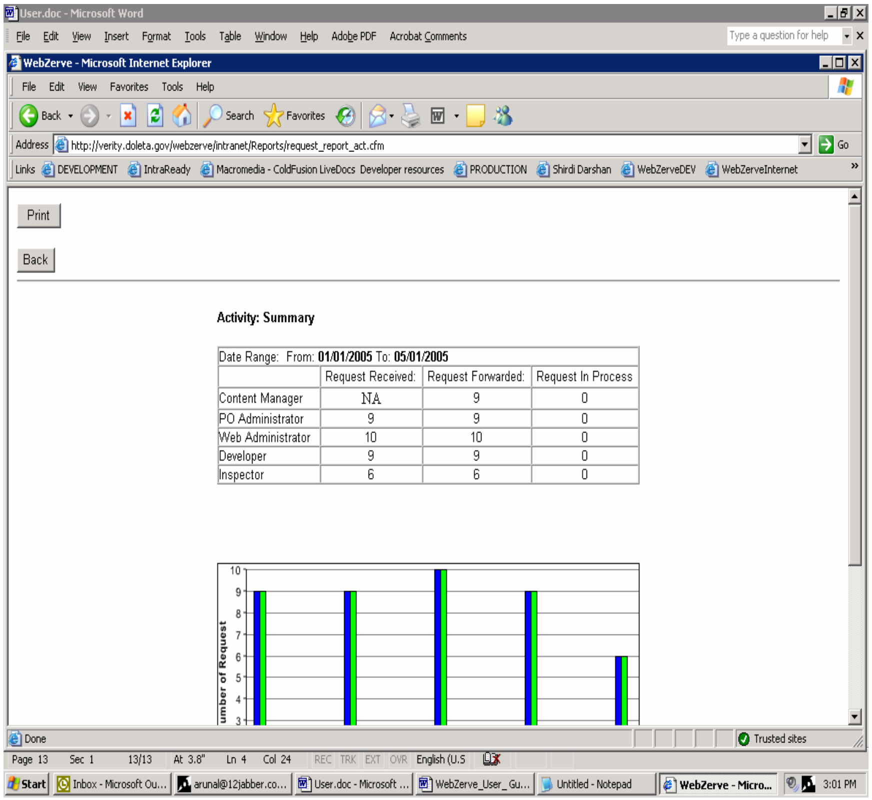


Figure 15 Activity Summary Report

ii.) Activity Weekly Summary - For Weekly Summary Report maximum Date Range is 4 weeks. Report information is similar to the Activity Report.

iii.) Activity By Role – generates report for selected role and person for the selected time period.

iv.) Activity By Response Time – generates a report showing number of requests completed by the selected role and person in a given time period.

Site Reports

These are the reports generated for the Site Profile Module. They can be accessed from Site Profile Module also. There are three types of reports.

i) By Individual Site – (figure 16) Shows a detail report of the selected site. It also displays links to any attachments (e.g. certificate of passing or failing site for 508 or ETA Compliance)

ii) 508 Review – (figure 17) Shows a list of sites with dates in 508process.

iii) ETA Compliance – (figure 18) shows a list of sites with dates in ETA Compliance (audit) process.

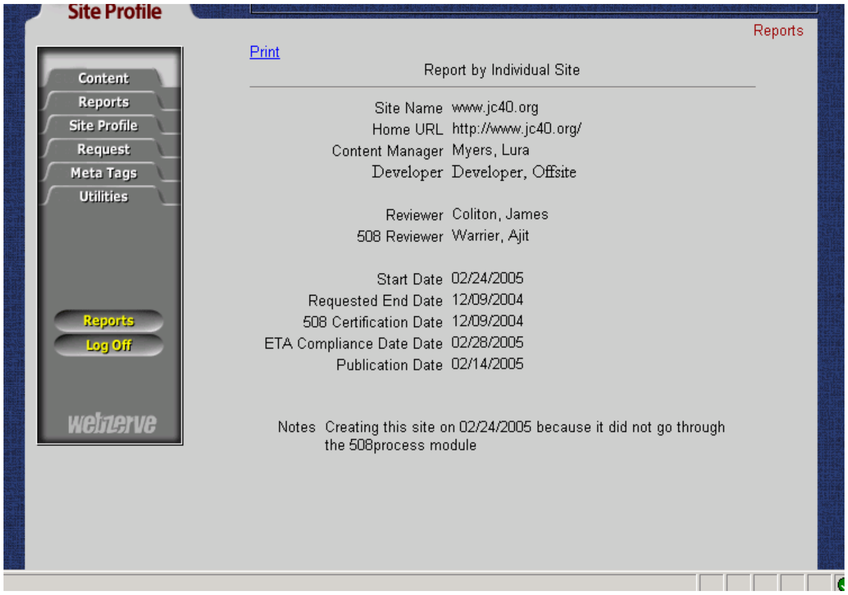
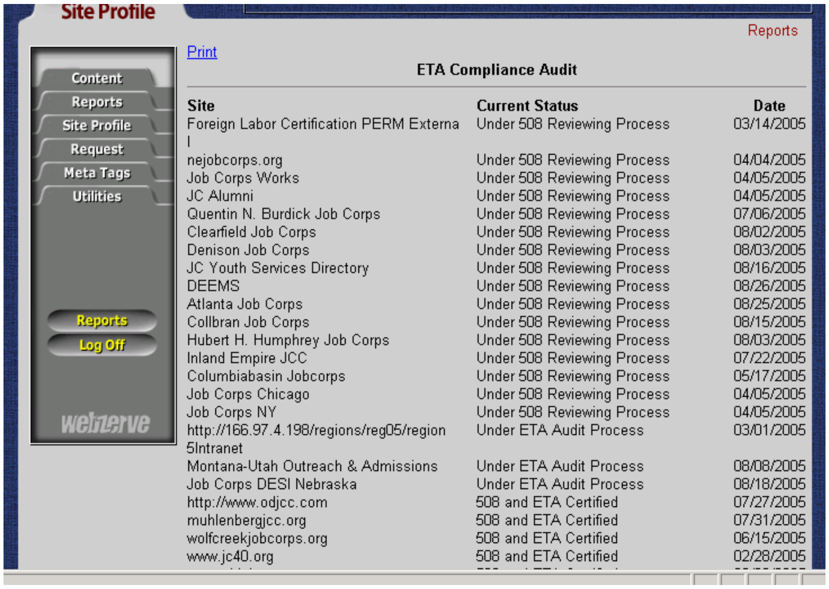


Figure 16 individual Report

Figure 17 – Sample 508Review Report



ETA Compliance Audit

Site	Current Status	Date
Foreign Labor Certification PERM External	Under 508 Reviewing Process	03/14/2005
nejobcorps.org	Under 508 Reviewing Process	04/04/2005
Job Corps Works	Under 508 Reviewing Process	04/05/2005
JC Alumni	Under 508 Reviewing Process	04/05/2005
Quentin N. Burdick Job Corps	Under 508 Reviewing Process	07/06/2005
Clearfield Job Corps	Under 508 Reviewing Process	08/02/2005
Denison Job Corps	Under 508 Reviewing Process	08/03/2005
JC Youth Services Directory	Under 508 Reviewing Process	08/16/2005
DEEMS	Under 508 Reviewing Process	08/26/2005
Atlanta Job Corps	Under 508 Reviewing Process	08/25/2005
Collbran Job Corps	Under 508 Reviewing Process	08/15/2005
Hubert H. Humphrey Job Corps	Under 508 Reviewing Process	08/03/2005
Inland Empire JCC	Under 508 Reviewing Process	07/22/2005
Columbiabasin Jobcorps	Under 508 Reviewing Process	05/17/2005
Job Corps Chicago	Under 508 Reviewing Process	04/05/2005
Job Corps NY	Under 508 Reviewing Process	04/05/2005
http://166.97.4.198/regions/reg05/region5Intranet	Under ETA Audit Process	03/01/2005
Montana-Utah Outreach & Admissions	Under ETA Audit Process	08/08/2005
Job Corps DESI Nebraska	Under ETA Audit Process	08/18/2005
http://www.odjcc.com	508 and ETA Certified	07/27/2005
muhlenbergjcc.org	508 and ETA Certified	07/31/2005
wolfcreekjobcorps.org	508 and ETA Certified	06/15/2005
www.jc40.org	508 and ETA Certified	02/28/2005

Figure 18 – ETACompliance Report

Chapter 4

Site profile

Site Profile module is role based and divided into 2 sections.
508 Tracking – tracks 508 Review Process
Users – Content Manager, Web Administrator, 508 Reviewer.
ETA Tracking – tracks the ETA Compliance Audit process.
Users – Web Administrator, Auditor and Content Manager.
After login click Site Profile Button on the left. Following Site Profile screen will be displayed.

Figure 19 Site Profile main

1.) Select Site Name from drop down list box to see the summary, 508 Certificate, ETA Compliance Certificate or report of failing
2.) **508Tracking:** Click 508 Tracking Button to start a 508 Review process
3.) **ETA Tracking:** Click ETA Tracking Button to start the ETA compliance audit tracking.
4.) **Report:** Click the Reports Button to see a report by *Individual Site*, *508 Review*, or *ETA Compliance Review*.

508 Tracking Flowcharts

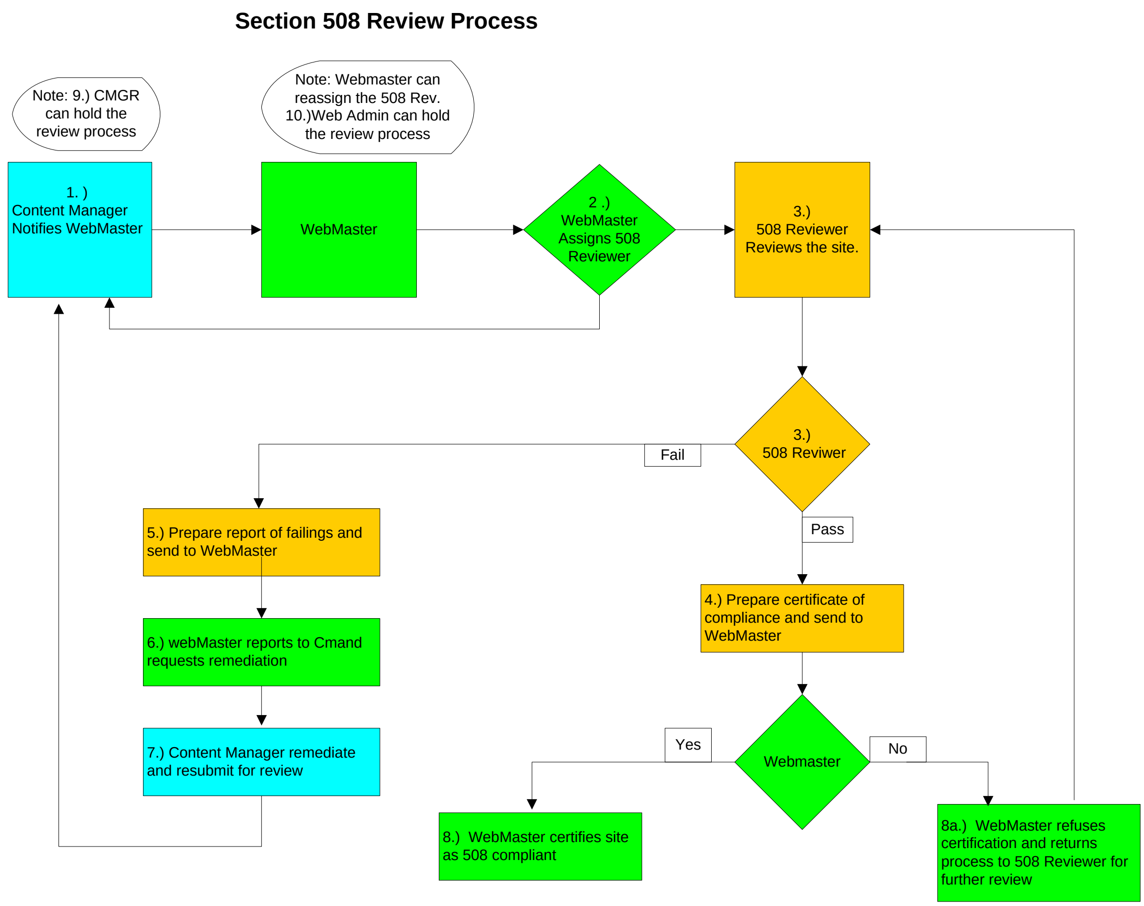


Figure 20 508Tracking Flowchart

508 Tracking

Content Managers

When a Content Manager clicks ‘508 tracking’ button following screen is displayed. The first line displays login content manager name and his role.

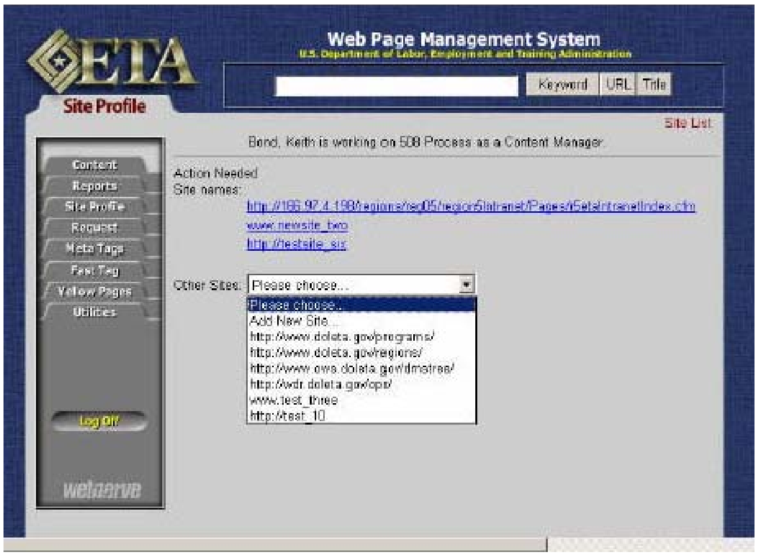


Figure 21 508 tracking page

Action Needed Site Names: List of site names which have been returned by 508 Reviewer and Web administrator for “Request Remediation” which need action to be taken by Content Manager. Click link to go to the detail page. If no action needed for content manager then no sites displayed.

Other Sites: Dropdown list of site names that are assigned to the login Content Manager but where the 508 process has not started yet. The first choice is “Add New Site”. If the site is not in the dropdown list box, select “Add New Site” or select the name from the dropdown list to go to the review add screen where you can initiate the 508 review process.

Add New Site and Initiate 508 Review Process:

If the site name is not in the dropdown list Content Manager Adds a new Site and initiates the 508 Review process in the same screen by selecting Add new site from dropdown list. See the screen below.

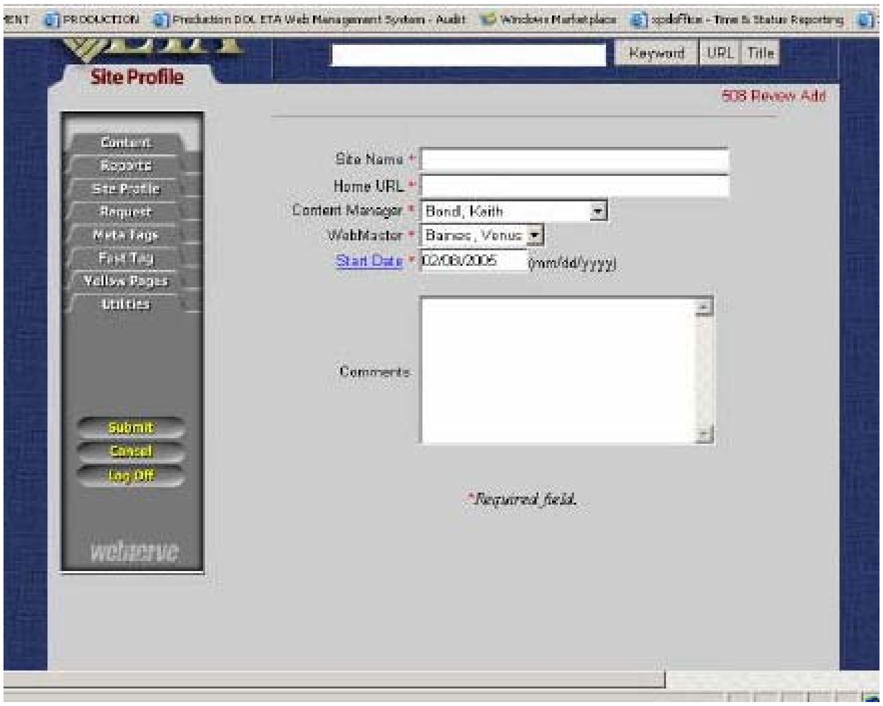


Figure 22 - Initiate 508 Review Process

Site Name: Insert Site name – required field

Home URL: home page – required field

Note: It is important to insert the correct Home URL name in order to spider the URL's from the site.

Content Manager: Login Content manager is selected in the dropdown list by default. – Field is editable

Webmaster: Venus Baines is select by default

Start Date: Today's Date by default – editable

Comments: Comments are made a part of the email when the email is sent to Webmaster on submit. After completing the information click 'Submit' to save and 'Cancel' to go back to the previous page. On submit the site is created, 508 process is initiated and an email notification is sent to the Webmaster.

508 Reviews Add:

If you select site name from dropdown list, the page will refresh and Review add screen will be displayed as follows:

Figure 23 - 508 review add

Site Name: Selected site name. – Read only.
Content Manager: Login (assigned) content manager for the selected site. ***Webmaster:*** Dropdown list of web administrator. Venus Baines by default – at present nothing to select. – Read only
Start Date: Today’s date by default. The date can be changed.
Comments: Content Manager can write his comments and click ‘Submit’ button. A confirmation page will be displayed and email notification will be sent out to Venus Baines and a carbon copy to the login content manager.

Web Administrator

When a Web Administrator clicks 508 tracking button following screen is displayed

Figure 24 - 508 tracking page for web master

Venus Baines is a system administrator so she can work as a Content Manager, Web Administrator or 508 Reviewer. By default she will work as a Web Administrator.

Action Needed Site Names: List of site names where a.) 508 Process is initiated by content manager. b.) 508 Process reinitiated if process stopped for any reason in the past by the content manager or web administrator c.) Sites back after content manager has made corrections to sites failed by 508 Reviewer and sent for request remediation. d.) Sites passed by 508 Reviewer.

Click the site link which will take you to the detail page.

Detail Screen

The detail screen changes depending upon site status. If 508 Process is initiated by content manager you will see the following screen.

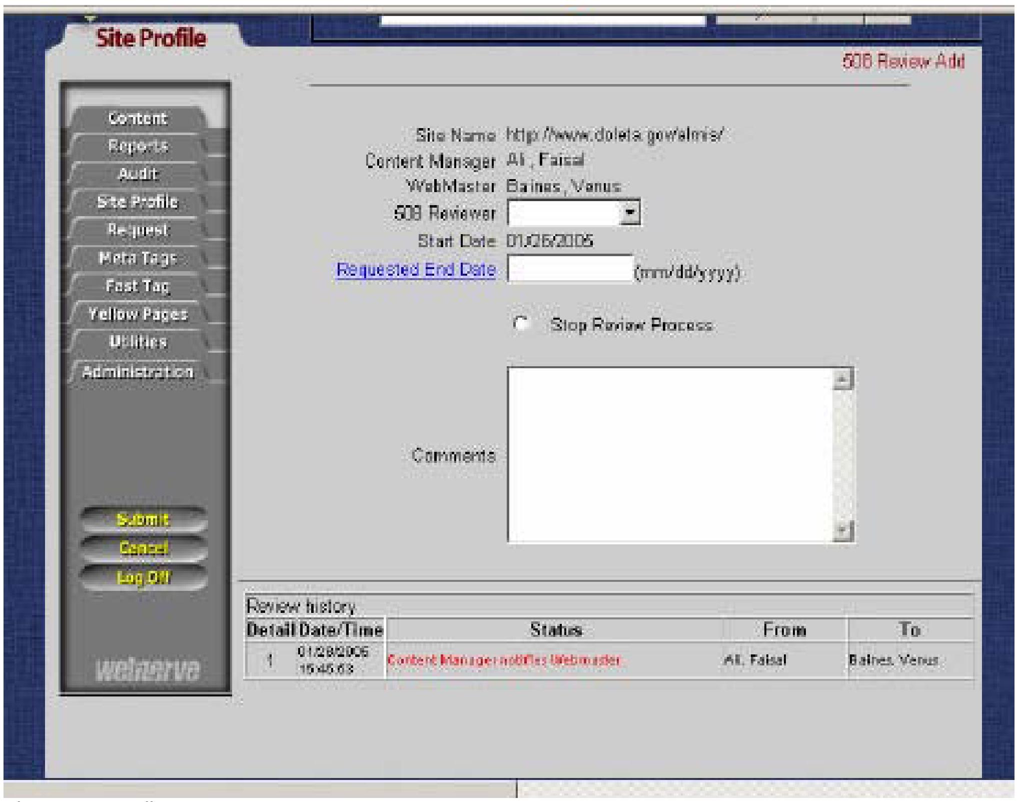


Figure 25 Detail screen

- In this screen Web administrator a) assigns 508 Reviewer from the dropdown list b) insert the Requested End Date c) Puts comments if any. d) Clicks Submit button -508 Reviewer is notified by email and a cc is sent to Web Administrator.

e) Web Master can also stop the process for any reason by selecting the Stop Review Process radio button and then click 'Submit" If process stopped content manager will be notified.
If process is reinitiated, nothing to select on this screen. (Comments if any) and Click 'Submit' button.

- If a Site is failed by 508 Reviewer and returned to Web master – *Request Remediation* and *Stop Review Process* radio buttons are displayed. a) Select Request Remediation button b) Put comments if any. c) Click Submit button – email is sent to Content Manger and cc to Web Master.
- If site is passed by 508 Reviewer and returned to Web master – *Certify Site* and *Back to Reviewer* radio buttons are displayed.

  a) Select Certify button b) Put comments if any. b) Click Submit button – notice of certification is sent to Content Manager and cc to Web Master. Alert box shows if you want to initiate Audit process. c) Page is refreshed and Request ETA comp. End date field is displayed. Fill in the Requested ETA Compliance End date and click submit and audit is initiated. You can click cancel if you do not wish to start the audit immediately. The audit process can be initiated by WebAdmin from the ETA Tracking module.

  NOTE: Webmaster can ask Reviewer to review again by clicking Back to Reviewer with comments. Webmaster is able to Stop Review Process any time.

Review history is displayed at the bottom of the page. The current status is displayed in red color.

508 Reviewer

When a 508 Reviewer clicks 508 Tracking button following screen is displayed

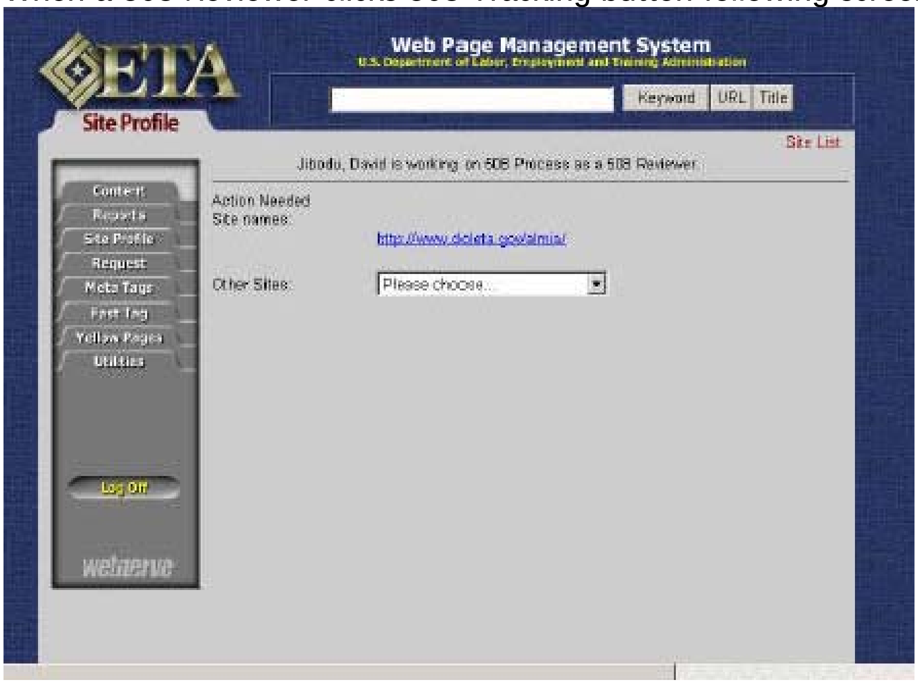


Figure 26-508 tracking screen for 508 reviewer

Login reviewer role and name is displayed.

Action Needed: List of site names that are assigned to the login 508 Reviewer and which needs action to be taken by the reviewer are displayed. Click the link which will take you to the detail page.

Other Sites: Drop down list of other sites in process where the login 508 reviewer is assigned.

Detail Screen
After Reviewer finishes his 508 compliance review he can pass or fail the site. If site failed select Fail radio button and write comments. Attach report and then click Submit. An email notification is sent to Web Administrator that the site failed and is not 508 compliant.

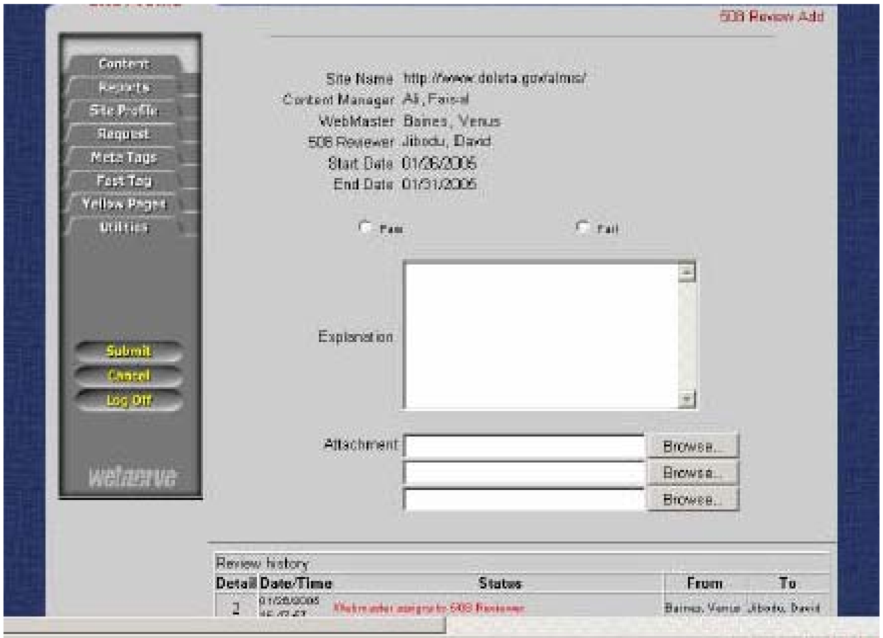


Figure 27- detail screen for 508 reviewer

If site passed, select Pass radio button, write comments. Attach the certification and then click Submit. If site passed attachment of certificate is required. An email notification is sent to Web Administrator that the site is passed and certified.

NOTE: a.) Final certification is given by the Web Administrator
b.) Webmaster can hold certification by asking the Reviewer to reconsider his/her findings.

The status of certified sites can be viewed in Site Summary.

Review history is displayed at the bottom of the page. The current status is displayed in red color.

ETA Tracking

ETA Tracking process is similar to the 508 tracking process with a few differences.

ETA Tracking (audit) is initiated by Webmaster from 508 tracking (if started immediately after 508 certification) or from ETA Tracking (if Webmaster chooses to initiate at a later date). After Auditor finishes his audit, he sends a failing report to Content Manger or a passing certificate to Webmaster, who in turn certifies for ETA Compliance. See flowchart below. This module functions similar to 508 tracking.

ETA Compliance Audit Tracking process -flowchart

Workflow for Audit process
Created 03/01/2005

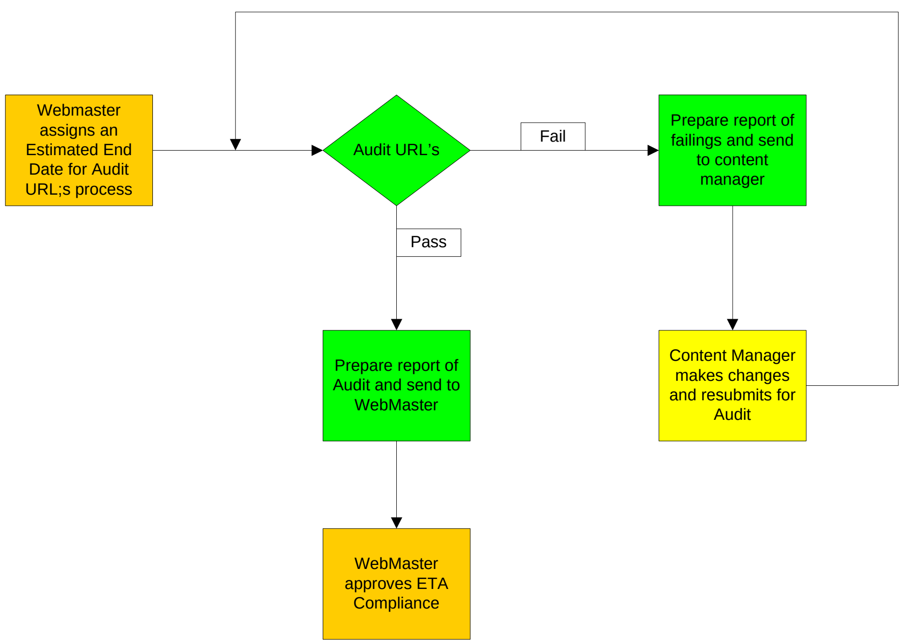


Figure 28 - Workflow for ETA Compliance process (audit)

Reports

When you click Reports button from the Site Profile module following screen is displayed.

Figure 29 - Site profile screen

Three types of reports can be run from this module.

By Individual Site – This is a summary report. Copy of the 508 or ETA Compliance Certificate or failing report can be obtained from this report by clicking the appropriate link
508 Review – displays current status of each site in 508 Review ETA Compliance Audit – Displays current status and certification dates of each site-.

NOTE: Audit Error Report can be run by the Content Manager, Auditor or Webmaster from the Reports Module.

Chapter 5

Audit

Access to the Audit functions of WebZerve is provided only to Auditors. If you believe you should have access to the Audit functions, please contact a WebZerve Administrator.

When you click on the Audit tab, the screen in **Figure 30** is displayed.

This is a chronological list, in descending order with status information of all audits conducted using WebZerve **Audit** module. Clicking on a specific **Audit Date** will take you to the **Audit Profile screen**.

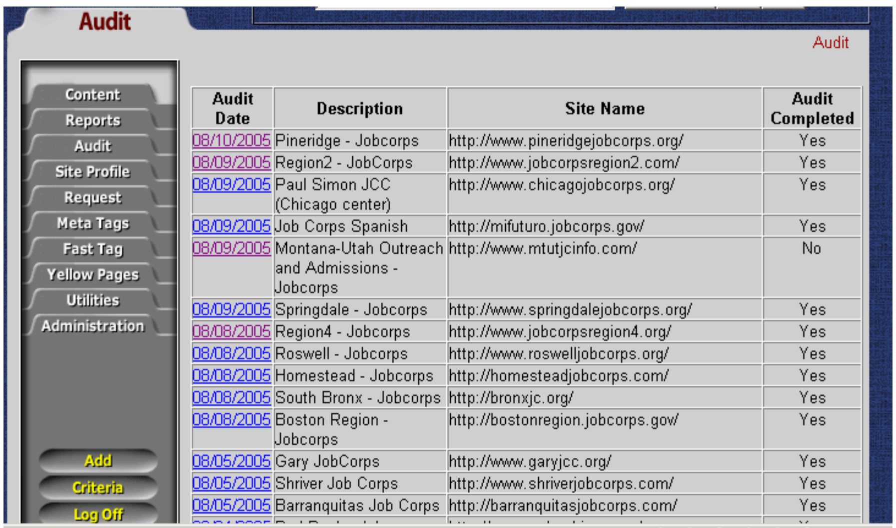


Figure 30 – Audit

Audit – Add

From the Audit page, if you click on **Add**, you are taken to the **Audit – Add** page (**Figure 31**) to define a new audit.

Date: Date Audit completion is expected.

Site: URL of the audited website(s).

Description: Text describing the constraints and limitations of the audit. This may include information concerning what is and is not reported in the audit and any unusual decisions made by the Lead Auditor during the course of the audit. User definable variable that specifies the sample size necessary to support an acceptable audit Margin of Error (MOE). The MOE is expressed as a percentage.

Score Threshold: This is the number of non-conformances that will result in a page 'failing' the assessment.

After filling in the information, click on the **Add** button. You will be taken to a screen confirming that the Audit has been successfully added. Click on **OK** to be taken to the **Audit Profile** page.

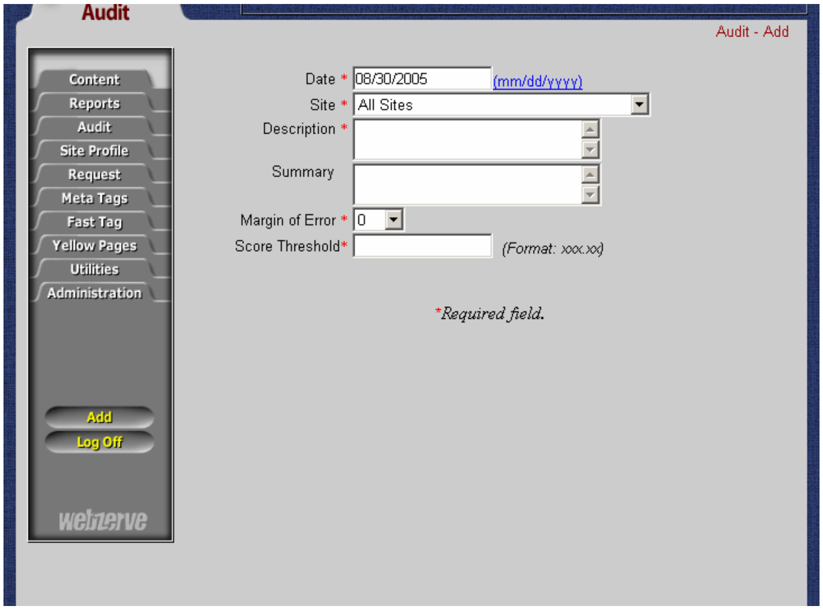


Figure 31 – Audit Add

Audit Profile

Audit Profile, illustrated in **Figure 32,** is very similar to the **Audit – Add** screen, but contains the additional features **Criteria**, **Sample** and **Update** in the toolbar.

To establish the criteria against which the Audit will be conducted, select the **Criteria** button on the toolbar which will take you to the audit assign criteria screen as illustrated in figure 33.

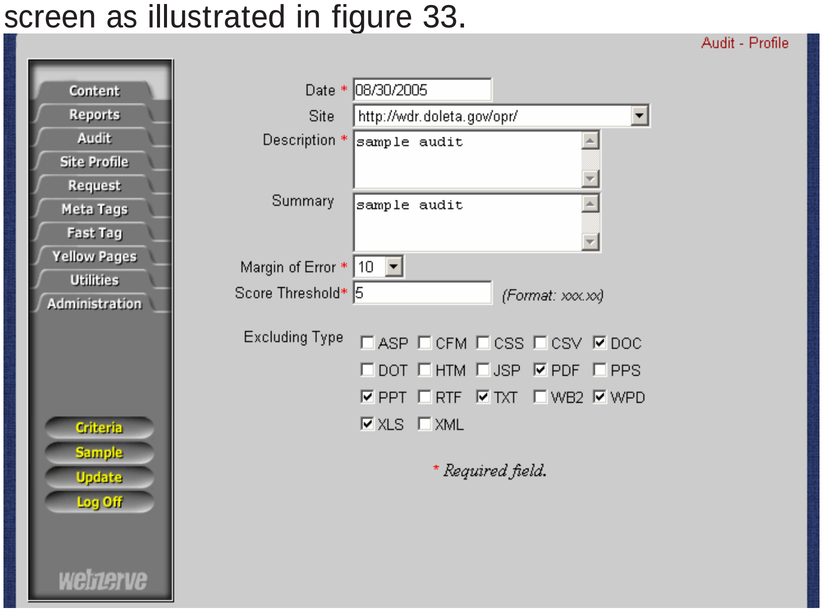


Figure 32: Audit Profile

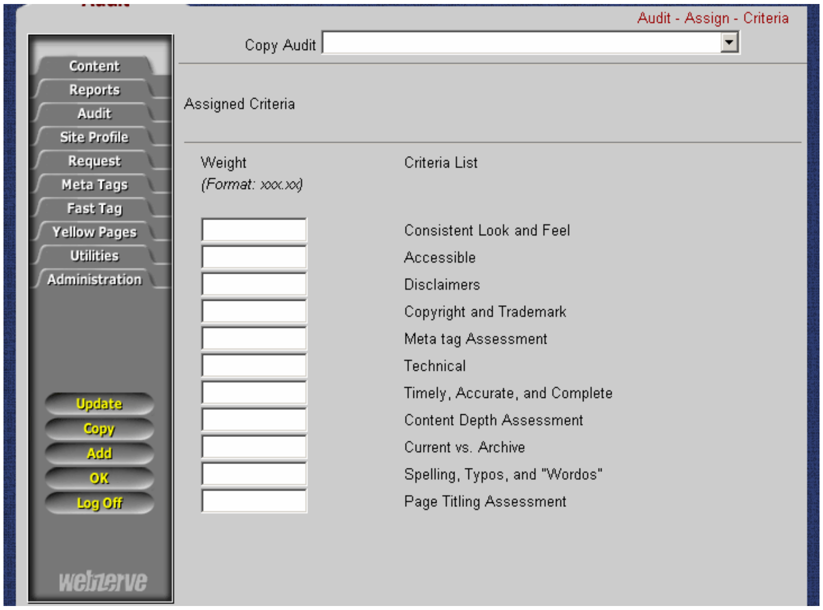


Figure 33: Audit – Assign – Criteria

If you wish to use the same criteria that a previously defined Audit used, then open the Copy Criteria feature to select an audit and click on the **Copy** button on the toolbar. The next screen will inform you that the Copy Audit was successful. Click on the **OK** button to return to the **Audit – Assign – Criteria** page to establish the weights for each criterion.

If you wish to simply assign criterion from the default list, then enter the weight into each text box next to the selected criterion. Click on the **Update** button and the next screen will show you a list confirming which criteria have been assigned, as well as opportunity to adjust the weights assigned and then **Update** the Audit. To remove a criterion, delete all text in the Weight text boxes and click **Update**.

Add: If you wish to add a new criterion to the default list, select the **Add** button, as illustrated in **Figure 32**, and then enter the Name (a brief title) of the criterion and a description of the criterion. Click on the **Add** button again to incorporate the criterion into the database.

When you are done establishing the criteria for the Audit, click on **OK** to return to the Audit Profile screen. From there, click on the **Sample** button. WebZerve will automatically create a random sample from the website selected for the audit, of a size sufficient to create the Margin of Error you have stipulated.

Sample Size: WebZerve calculates and displays the number of web pages analyzed in support of the specified margin of error.

After pulling the sample, click on the **Lock** button. Click on the **OK** button to return to the **Audit Profile** screen. The **Audit Profile** screen will now have different functions on the toolbar.

To review a page from the sample, click on the **Request** button.

WebZerve will select a URL from the sample and present it on the screen.

Click on the URL hyperlink, as illustrated in **Figure 34,** to bring up the **Audit – URL Findings** screen, as illustrated in **Figure 35**.

The URL address hyperlink, if selected, will open the web page in a new

window.
Beneath the URL address are the titles of the criteria selected for the Audit. Clicking on a criterion's title will open a pop-up window containing a description of the criterion. The center column is to record the number of non-conformances found when assessing the page against that criterion. The right hand column is to record comments on the nature and quality of the audit findings.

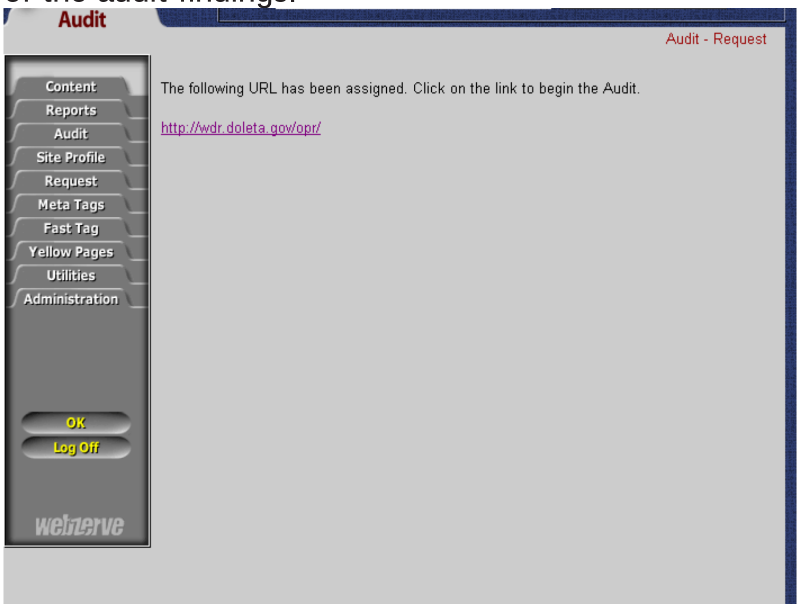


Figure 34: Audit – Request

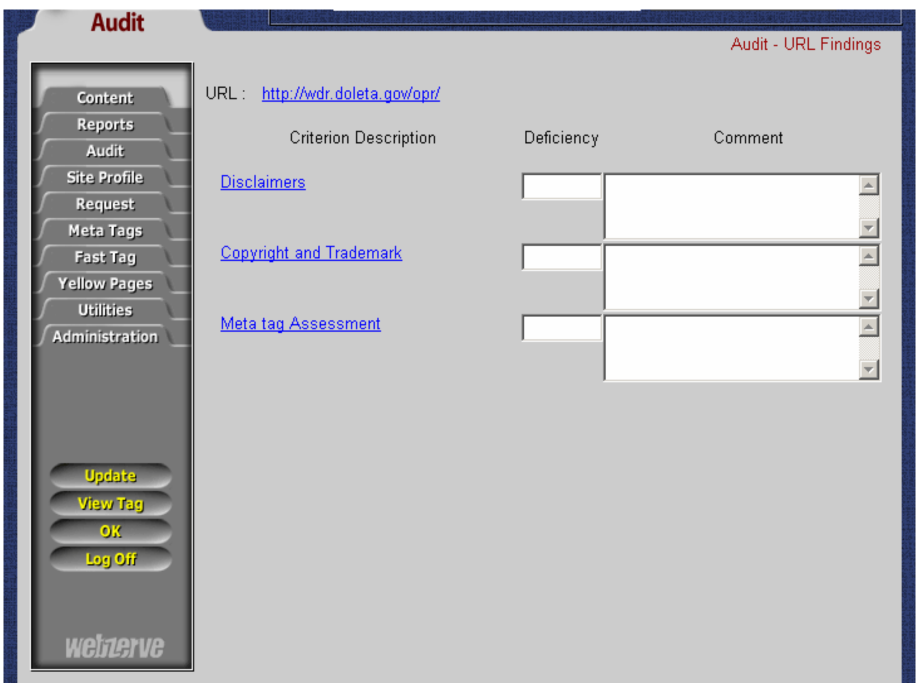


Figure 35: Audit – URL Findings

The **View Tag** button creates a pop-up window displaying the page's assigned Metatags. This feature makes it easier to assess a page's compliance with Metatag policies and standards.

Once you have completed the assessment on the page, click on the **Update** button. The results will be saved to the audit database and a message 'The Audit has been updated successfully!' will display:
From this page, you may select the **Request** button to receive a new URL from the audit sample. Click **My URL** button to see the list of URLs previously assigned to you (**Figure 36**), or the **OK** button to go back to the **Audit – URL Findings** page.

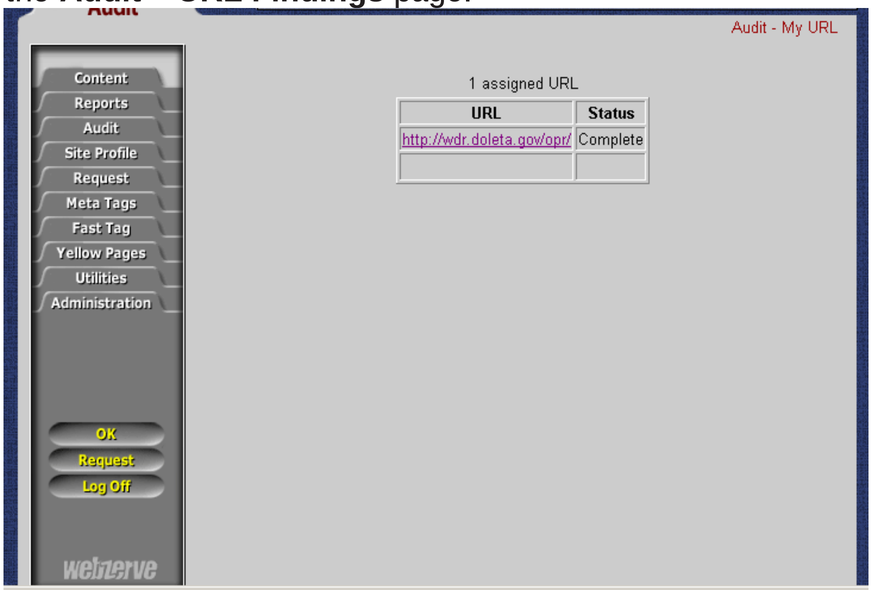


Figure 36: Audit – My URL

Clicking on the URL will take you to the **Audit – URL Findings** for that URL.

Audit – Report

From the **Audit Profile** page you may select the **Reports** button and go to the **Audit – Report – Selection** screen.
Use the drop down list to select the type of report you would like to Generate. For more details on audit reports refer to Reports section.

Chapter 6

Requests

The request module keeps track of all the requests made by content manager to create/update site or urls. It allows the content manager to assign the work to a developer, send attachments of related documents and links of related URLS. The request module displays a list of pending tasks assigned to the logged in user. (figure 37) Before and after the work is started by the developer the request has to go thru several checks and approval process.

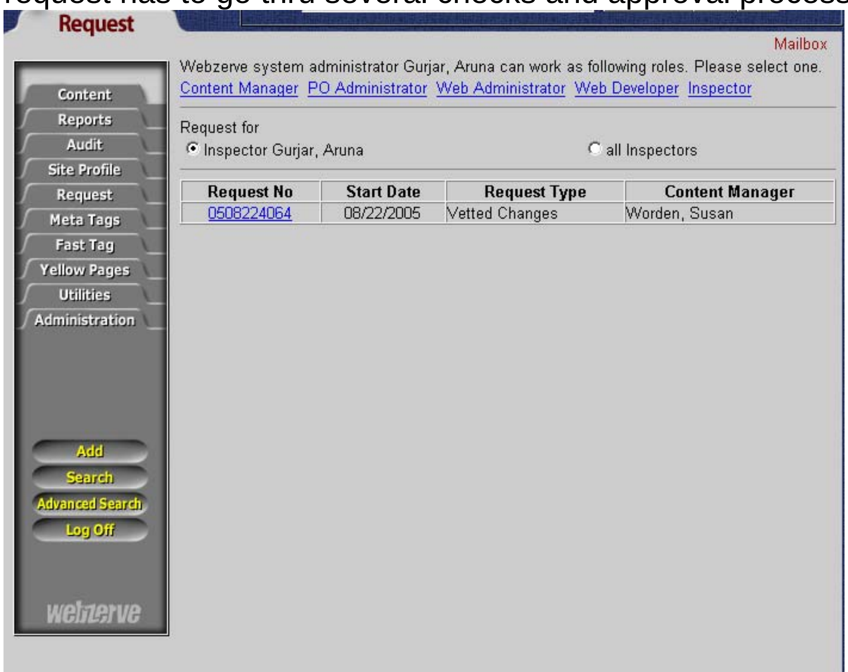


Figure 37 request mailbox screen

Request Process

Request is created by Content Manager (CMGR) then sent to Program Office Administrator (POAdmin) who approves the request or Kills the request. If the request is approved by the POAdmin it is submitted to Web Administrator (WebAdmin) who in turn assigns the request to Web Developer (WEBDEV). Once the work is completed, Inspector (AUDIT) does a final check before he notifies content manager to approve and post to production. If he finds a problem he sends it back to Web Administrator's opinion. Content Manager if approves the request notifies developer to post the request to production. Developer marks the request as completed once he posts it to production.
See Appendix I for detailed diagram.

Appendix I - Web Posting Process: New Site/URL and Update Site/URL

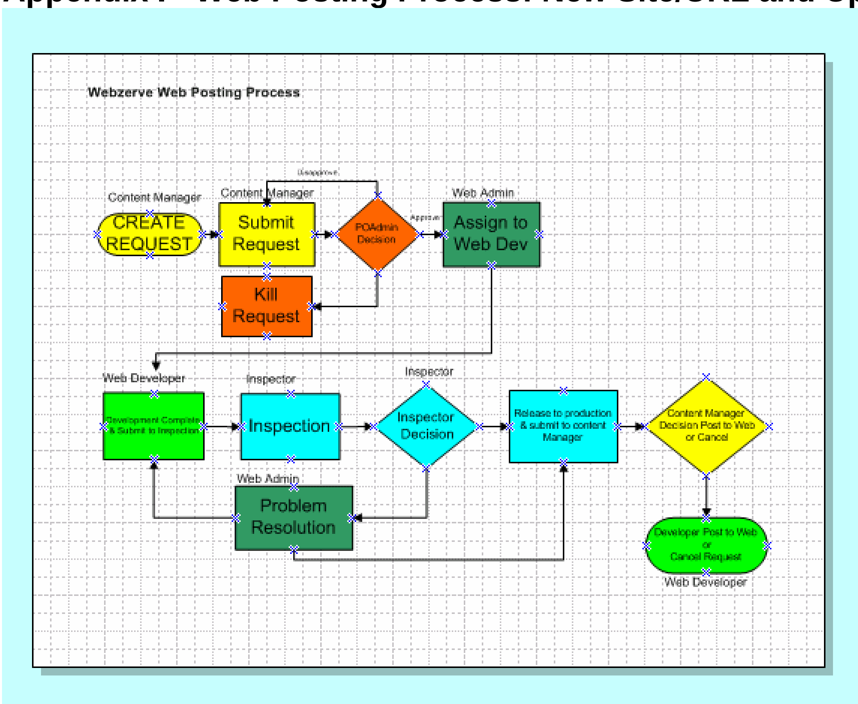


Figure 38 web posting process for regular requests

If the request type is Vetted New or Vetted Change the request does not have to be approved by POAdmin. See Appendix II for detailed diagram.

Appendix II - Web Posting Process: Vetted New and Vetted Changes.

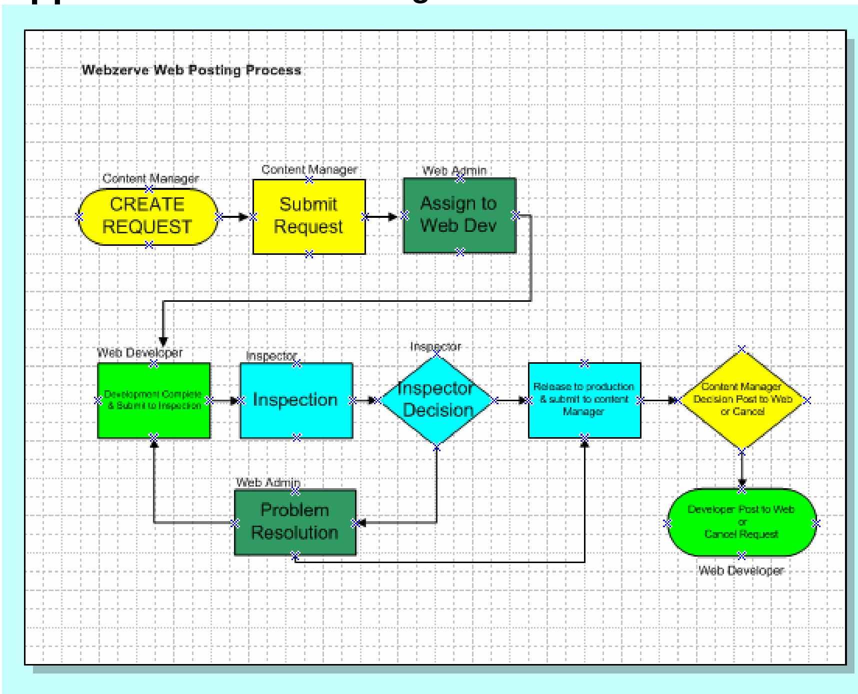


Figure 39 - web posting process for vetted requests

Role Responsibilities

CMGR - Content Manager creates request for adding or updating web site or web page. The request should include all required information and submit the request to POAdmin with optional comments. Content Manager gets an email and the request is displayed in the mailbox screen under “Request for Posting to Production” when request completed in development server. It is the responsibility of the Content Manager to check and approve the work and notify developer to move it to production thru Webzerve.

POAdmin - Program Office Administrator can approve, disapprove or terminate a request submitted by content manager. If approve send to Web Administrator with optional comments. If disapproved back to content manager with reason. Content manager can modify and resend the request. If terminated request is killed.

WebAdmin - Web Administrator assigns the request to developer by selecting a developer from dropdown list. If the request is back from Inspector with problem, WebAdmin determines whether to release the changes to production or return to web developer for corrections. Web administrator can reassign the request to another developer if the developer is not available and also flag it as high priority by going to all developers and selecting the request and going to the workflow screen.

WEBDEV - Web developer completes the request and sends the request to Inspector from dropdown list, with optional comment. Web developer should provide the URL link in optional comment so that the inspector can review the page before sending to production. High priority requests will be flagged by a red color exclamation (!) mark in the mailbox screen for the logged in developer.

AUDIT - Inspector audits web developer changes based on request and criteria. Release the changes to production or send the request back to WebAdmin if problems found. The request is not closed until developer posts the changes to production or cancels the request via Webzerve after Content Manager has reviewed the changes on the development server and instructed developer to post to production or cancel the request.

Create Request

CMGR can create Request through the request add screen (figure 40) by clicking Add button in the mailbox screen.

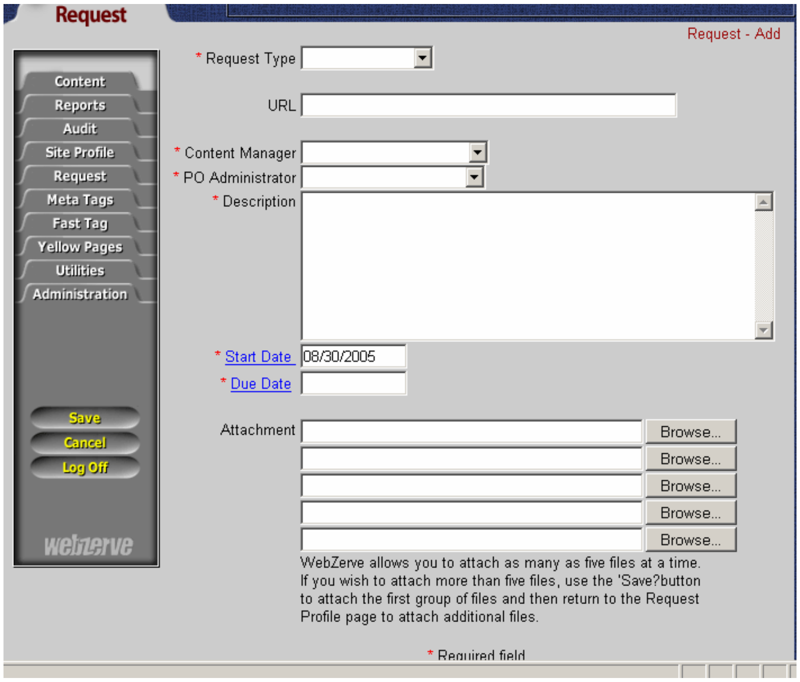


Figure 40 Request add screen

CMGR provides Request Type and names of Content Manager and PO Administrator by selecting the info from the list boxes. He also provides description of the work to be done, Start date (which is today's date by default) and the date the job has to be completed as End date. He can attach supporting documents by clicking the Browse button and selecting files from pop window. He can attach 5 documents at a time. Webzerve automatically generates a request number when the request is saved. Click on Save will bring you to the workflow screen where you click on the Submit Request link. An email notification will be sent to POAdmin or Webadmin depending upon the request type. NOTE: The request is not complete until you click Submit Request in workflow screen.

Edit Request

Assigned CMGR can edit request until it is submitted. Once the request is submitted to POAdmin or Web Admin, it is locked and cannot be edited.

CMGR can click on request number link in pending task table to edit the request. The table fields include request number, start date, request type and content manager.

Workflow

Mailbox screen displays requests depending upon the role of the person logged in. You can select the request to see the status in profile screen (figure 41) and then go to the workflow screen (figure 42)

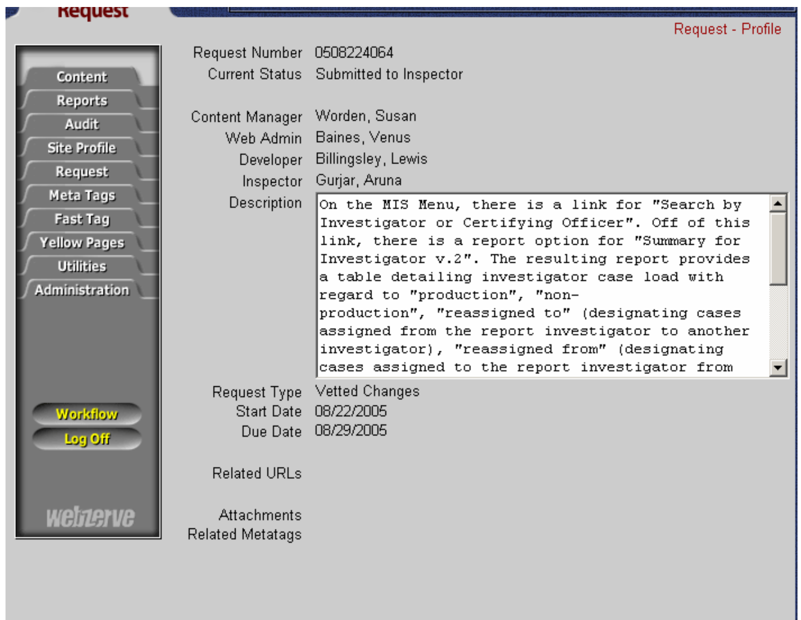


Figure 41 Request Profile screen

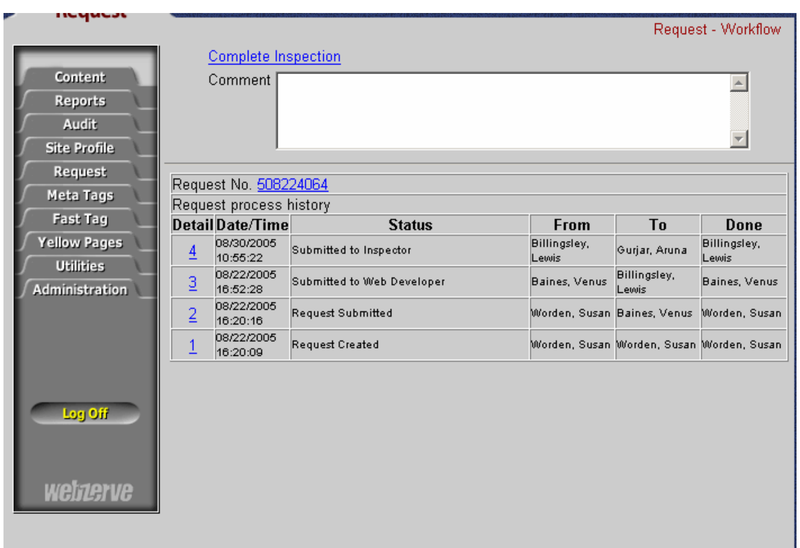


Figure 42 - Workflow screen

where you can fulfill your role in the request process. (see Role Responsibilities for detail.) The workflow screen displays workflow process history. Click the number in the detail column to see comments and person information. (see figure 43)

Figure 43 workflow detail screen

Request Process Cheat Sheet for Content Managers.

Create Request

1.) Login to Webzerve at http://verity.doleta.gov/webzerve/internet/login.cfm
USERID: first initial of first name and last name
PASSWORD: doleta (or the one you have created)
2.) Click Request Button on the left. This will take you to the mailbox screen.
3.) Click Add button on the left which will take you to Request add screen.
4.) Fill in the information and click Save. The request will be saved and you are back in the workflow screen.
5.) Attachments. You can add 5 attachments at a time. To add more than 5 attachments simply save and come back to the profile screen before you submit the request.
6.) Click Request Submitted. WebAdmin or POA will be notified by email to process the request and the request will disappear from your mailbox.
7.) *If you have a long description to write, please write it in word and then copy and paste it in the description box. **For security reasons** application will log you out if the application sits idle

Posting to Production

1.) After the work done is approved by the auditor you will be notified by email and the request will reappear in your mailbox under “Request(s) Post to Production”
2.) After you have proofed and approved the development version of changes login to Webzerve
3.) Click Request and come to mailbox screen.
4.) Click the request number under **Requests for Posting to Production** and you will come to profile page.
5.) Click workflow (yellow button on the left) and you will come to workflow screen where you have 2 options. a.) Please Post to production b.) Please Terminate/Cancel Request. Choose your option by clicking on the link. You can put comment (if any) to the developer in the comment box.
6.) Developer will be notified by email to post to production along with the comment (if any).
7.) Developer after posting it to production or canceling the request will enter “posted to production” or “cancelled” thru webzerve and you will be notified. This completes the request.

Chapter 7

Meta Tags

Use the Metatags tab to open the WebZerve features for managing the Metatag catalog. You can add a new Metatag to the database from the following screen. Adding or modifying Metatags is limited to the Administrator level only. Other users are not allowed to alter the Metatag databases.

When you click the **Metatags** tab, you are taken to the **Meta Tag – Dictionary** home page, illustrated in **Figure 44**.

"Metatag" is the root folder containing all available metatags. Click on the **Metatag** folder to display the Metatag database tree. The database tree is essentially a hierarchical listing of the metatags in the folder. Click on the **+** sign to the left the folder name and that folder will expand, displaying the Metatag values under it.

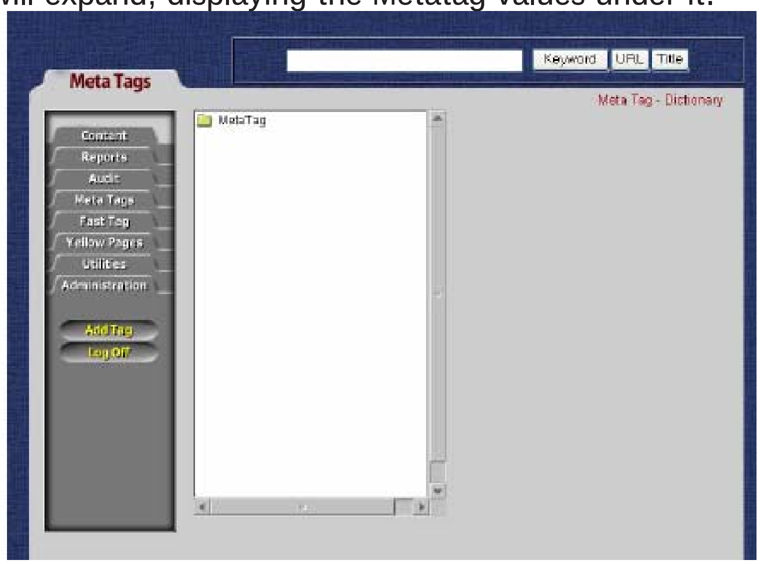


Figure 44: Metatag - Dictionary

Click on a Metatag value, and the **Metatag – Value Profile** page for that specific Metatag will display, as illustrated in **Figure 45**.

From the **Metatag – Value Profile** screen, you are able to:

- edit the existing Metatag values by changing the information in the right hand area of the screen.
- add another Metatag value to this Metatag by using the **Add Value** button.

Name: Value name
Type: Global or local
Relevant: Relevant, Yes or No
Org: Click the down arrow to select your Organization
Selectable: Yes or No

Description: Description of Metatag

Figure 45: Metatag – Value Profile

- ➢ reposition the Metatag in the hierarchy by using the **Move Value** button

To change the parent of a value, just click on the **link** that you wish to assign as the parent.

Name: Metatag name
Type: Global/Local
Relevant: Yes, No - a relevant tag can be added to a URL.
Org: Click the down arrow to select the organization you represent.
Selectable: Yes/No
Description: Type in a description for this new Metatag.

- ➢ add another Metatag under this Metatag by using the **Add Tag** button, see **Figure 47**.

Name: Insert tag name. This is the only required field here.
Type: Type can be global or local. Use the drop down list for selection.
Relevant: Yes or No - Yes; Metatag is relevant - No; Metatag is not relevant.
Organization: Select your organization from the drop down list by clicking on the down arrow beside the organization name.
Selectable: Metatag is optional and not mandatory.
Description: Insert a description of the tag.
Default Value: Insert the default value.

Figure 47: Metatag – Tag Add

After making any changes, be sure to select the **Save** button. You will see a confirmation that the Metatag has been added successfully to the database. If you select **Cancel,** the information you entered will not be saved and you will go back to the **Meta Tag – Dictionary**

To exit WebZerve, click **Log Off.**

Chapter 8

Fast Tag

Selecting the **Fast Tag** tab will take you to the Metatag assignment features of WebZerve. Within Fast Tag, you will be able to review the Metatags currently assigned, and edit or create Metatag assignments.

The home page for the Fast Tag feature is **Fast Tag – URL – All**. An example is shown in **Figure 48**. If you select one of the URL hotlinks in the report, you will be taken to the **Fast Tag – URL – Assignment** page, illustrated in **Figure 49**. The features of this page include:
URL hotlink: will open the web page in a new window for review.
Metatag Catalog: selecting a Metatag hotlink will reveal the hierarchy of tags beneath the selected Metatag. You can assign specific Metatag to the page by selecting the desired tags using check boxes next to the tags, then clicking on the **Submit** button. The database will refresh, and you will notice that your newly assigned Metatag is shown in the window above the Metatag hotlinks.
Profile: Clicking on this button in the left hand tool bar will take you to the content profile screen for this web page.
Freeform: Clicking on this button in the left hand tool bar will take you to the Freeform Metatag assignment screen. (See the next section for details about using the Freeform feature.)

Figure 48: Fast Tag – URL – All

Figure 49: Fast Tag – URL – Assignment (Structure Screen)

You can return to the Structure Screen by simply clicking the **Structure** button on the left hand tool bar.

Figure 50: Fast Tag – URL – Assignment (Freeform Screen)

Fast Tag – URL – Assignment (Freeform Screen)

At this screen, you are able to create and assign Metatags that are unique to the page. Freeform Metatags, **Figure 50**, are considered optional, unlike tags that are mandatory for various web pages. These additional Metatags can be added to a page at the discretion of the organization working with the page. Freeform Metatags are available across various agencies.

Simply enter the Metatag text into the appropriate text box and click on the **Submit** button. You can also assign more than one tag at a time by selecting the desired number of tags by using the **Shift** or **Ctrl** key and clicking **Submit.** You can remove Metatag by highlighting them in the top window and using your **Delete** key to remove them.

Fast Tag – Status

Use **Fast Tag**, **Figure 51**, to add a pre-set series of Metatags to a web page. This number is generally 80% of the total population of available Metatags. Click on **Status** to display a report with the following information:

URL Population: Number of URLs in 100 and 80% of the total URL population.
URL Metatag Count: Number of URLs having this many Metatags, 1 - 4.
Metatag URL Count Goal: Difference between 80% and the number tagged.

Figure 51: Fast Tag – Status

Chapter 9

Yellow Pages

The Yellow Pages function forms an internal taxonomy system. Refer to it to identify and locate individuals with specific subject matter knowledge (experts) within your organization.

The initial Metatag screen and Yellow Pages screen, illustrated in **Figure 52**, look alike but their functions differ. From Yellow Pages the user can view, add, update or delete the subject matter experts assigned to the Metatag while from the Metatag screen one can view, add, update or delete a Metatag or view, add, or update or delete a Metatag value in reference to an existing Metatag.

By default you will see a single Metatag root folder.

1. Double click the **folder** to expand the list under the Metatag root folder. (The figure displays an expanded Metatag tree.)
2. Click any **plus sign** to expand the Metatag tree further.
3. Click a Metatag **Name** link to view, add, update or delete an expert to the Metatag.

Cancel: To cancel your transaction, click **Cancel**.

Log Off: To exit, click **Log Off**.

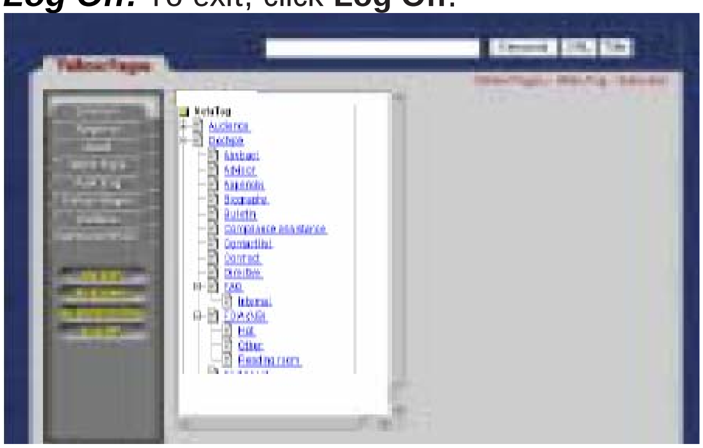


Figure 52: Yellow Pages – Meta Tag – Selection

Yellow Pages – Meta Tag Value – Expert

Clicking the Metatag **link** in the left hand window displays the following, as illustrated in **Figure 53**.

By Tag: By default the Metatag tree is sorted/ordered by tag.

By Expert and By Organization: In the future these buttons will be used to link to the screen displaying the Metatag tree sorted/
ordered by the Expert/Organization respectively.

Add Expert: To add a new expert to the Metatag click the **Add Expert** button.

Delete Expert: To delete an existing expert select the checkbox to the right of the expert name and then click **Delete Expert.**

Log Off: To exit, click **Log Off**.
To update an expert, click the **Expert Name** link. The screen is similar to the **Add Expert** screen. Here you can only update the comments.
Cancel: To cancel your transaction, click **Cancel**.
Log Off: To exit, click **Log Off**.

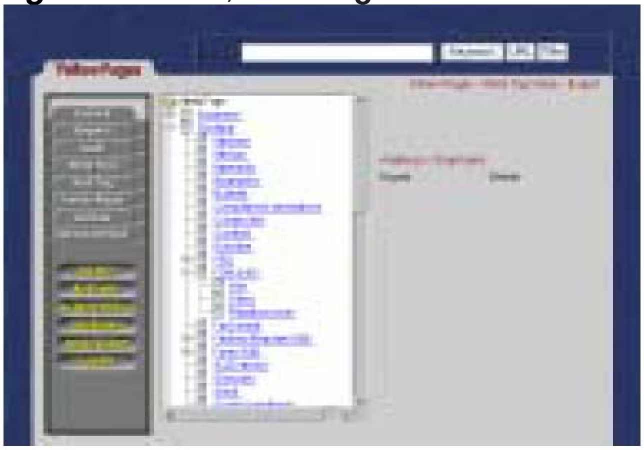


Figure 53: Yellow Pages – Meta Tag Value – Expert

Yellow Pages – Meta Tag Value – Expert –Add
When you click the **Add Expert** button in the Yellow Pages screen the **Add Expert** screen displays, as illustrated in **Figure 54**. Here you can add an expert to the selected Metatag.
Note: Add an expert profile through the **Administrative Person** –**Add** screen.
Expert: Select an expert name from the dropdown list box.
Metatag Comment: Insert your comment.
Add: Click **Add** to save the information.
Log Off: To exit, click **Log Off**.

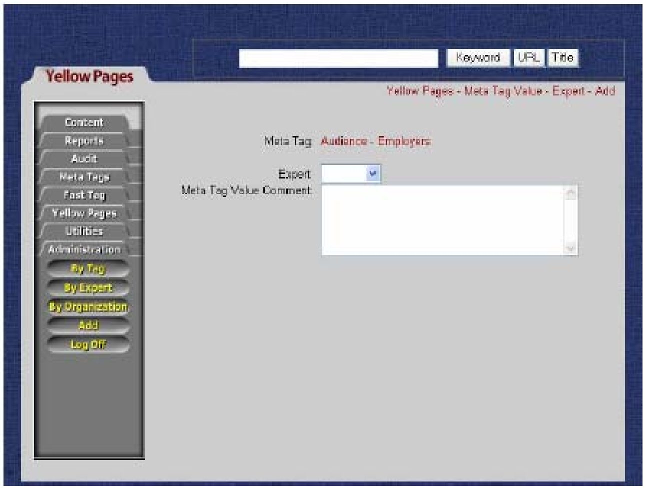


Figure 54: Yellow Pages – Meta Tag Value – Expert – Add

Chapter 10

Utilities

When you click on the **Utilities** tab the following screen, **Figure 55**, is displayed. From here you can change your password.

1. Enter your new password.
2. Re-enter the password for confirmation.
3. Click on **Save**. A message confirming your new password will be displayed. When you login the next time please use the new password you just assigned.

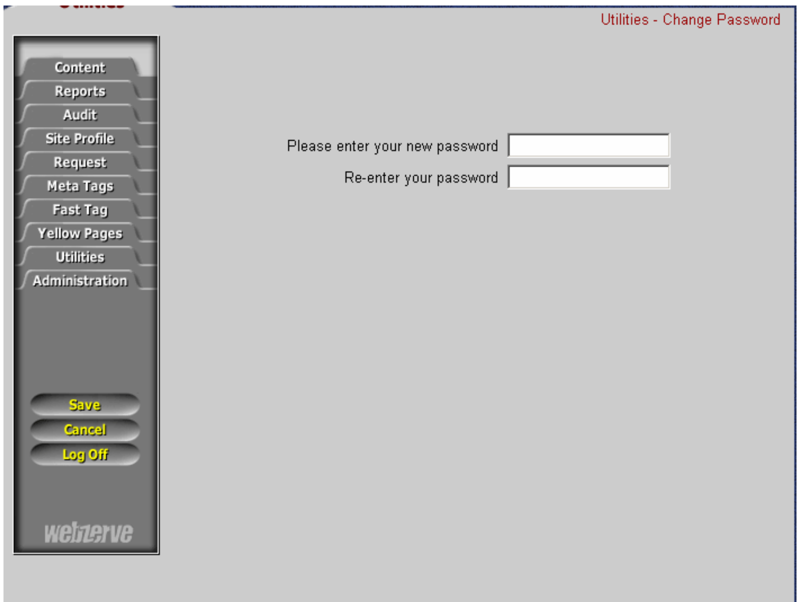


Figure 55: Utilities – Change Password

Chapter 11

Administration

The Administration Module, illustrated in **Figure 56**, is available only to users with administrative rights.

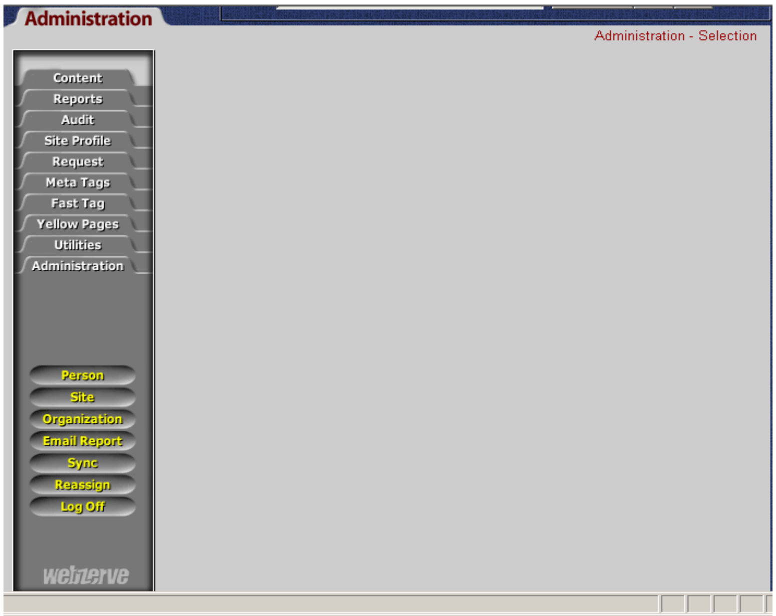


Figure 56 - Administration – Selection

Add, update or delete a person, site or organization from within this module. Persons consist of Developer, Content Manager, Administrators, Auditors, PO Admin, or 508 Reviewer.

Person: Click **Person** to add, update or delete a person.

Site: Click **Site** to add, update or delete a site.

Organization: Click **Organization** to add, update or delete an organization.

Email Report: Click Email Report to email a Next Review, Last Modified, or Expiration Report to Content Managers or developers.

Sync: Click **Sync** to synchronize the data for a particular website or all the websites with a suitable database.

Reassign: Click 'Reassign' to assign a module to the role.

Log Off: To exit, click **Log Off**.

Person Add

When you click the **Person** button on the Administration screen the **Administration – Person** screen displays, as illustrated in **Figure 57**.

Update: To update a person, select a person from the dropdown list and click **Update**.

First Name: Insert the first name of the person.

Middle Name: Insert the middle initial.
Last Name: Insert the last name.
Phone: Insert the phone number and the extension if applicable. The format must be "(xxx)xxx-xxxx".
Fax: Insert the fax number and the extension if applicable. The format must be "(xxx)xxx-xxxx".
Email: Insert an email address.
Organization: Select an organization name from the dropdown list. ***Roles***: Select the applicable check box to assign a role. You can assign more than one role to a user. Once you have inserted the entire data, click **Add** to save.

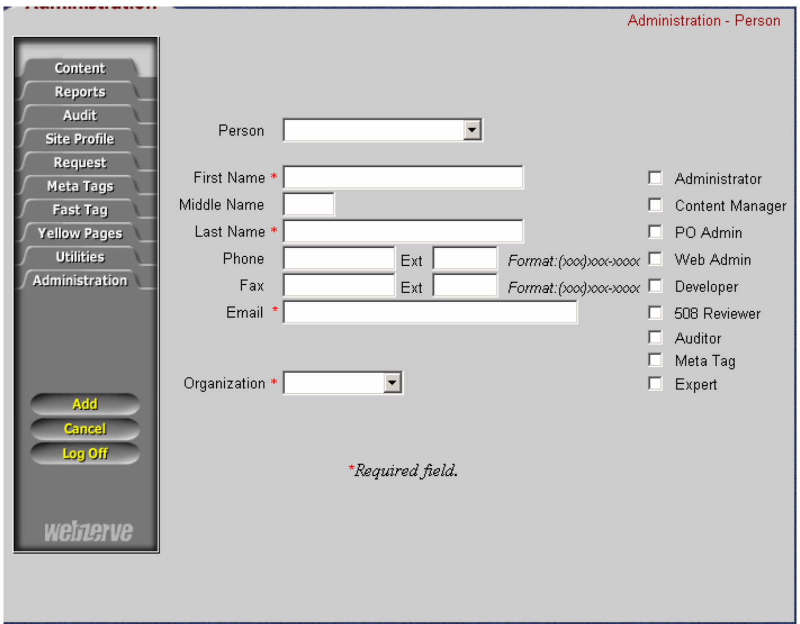


Figure 57: Administration – Person

My URL: Clicking on this button moves to the **Administration – Reassign URLs** (Contract Manager) page, as illustrated in **Figure 58**. Select the URLs that you wish to reassign, select the person to whom the URLs are to be assigned, and then click on **Reassign**.
Click on **Cancel** to return to the **Administration – Person** page.
Note: The My URL button is visible only if the user has URL's assigned to him. Another way to access the Reassign URL's screen is by clicking URL's number link at the top of the screen.

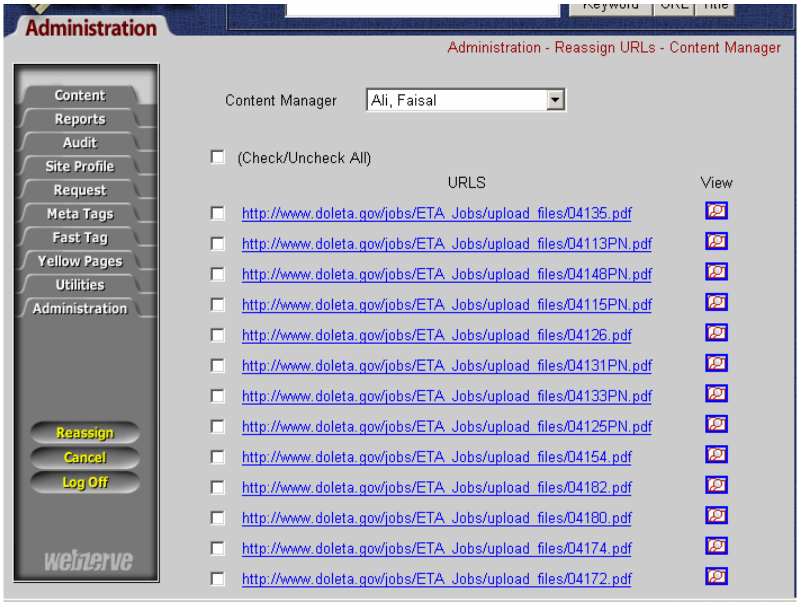


Figure 58: Administration – Reassign URLs – Content Manager

Person Update

From the person update screen a system administrator can update the person information and also reset an expired or locked password to default password which is 'doleta' for the selected person by clicking the Reset Password link.

Update: Click **Update** to save your changes to the screen.
Add Org: Click **Add Org** to add a new organization. A person must belong to at least one organization; he or she may belong to more than one organization.
Delete Org: Select the checkbox to the organization that you wish to delete and then click **Delete Org.** You cannot delete all the organizations.

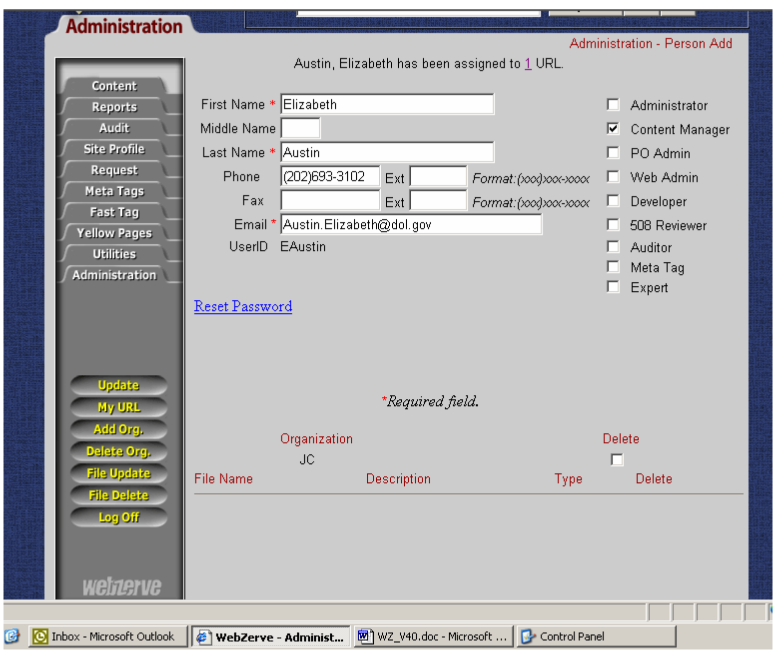


Figure 59: Administration – Person Update

File Update: This button has a dual functionality (add and update).
Add- You can add a picture file or a word document describing the person/expert to the database by clicking the ***File Update*** button. If a file with the same name exists in the database, the message "File with This Name Already Exists" displays.
File Delete: Select the checkbox to the file to be deleted and click **File Delete**.
Update Person When you click the **Update** button on the **Person Add** screen person update screen displays.

On the **Person Add** screen, **Figure 58**, basic information is added for the person, but from the update screen you can add an organization to the person profile. You can also add information such as a picture file or biographical document related to the person to the database.

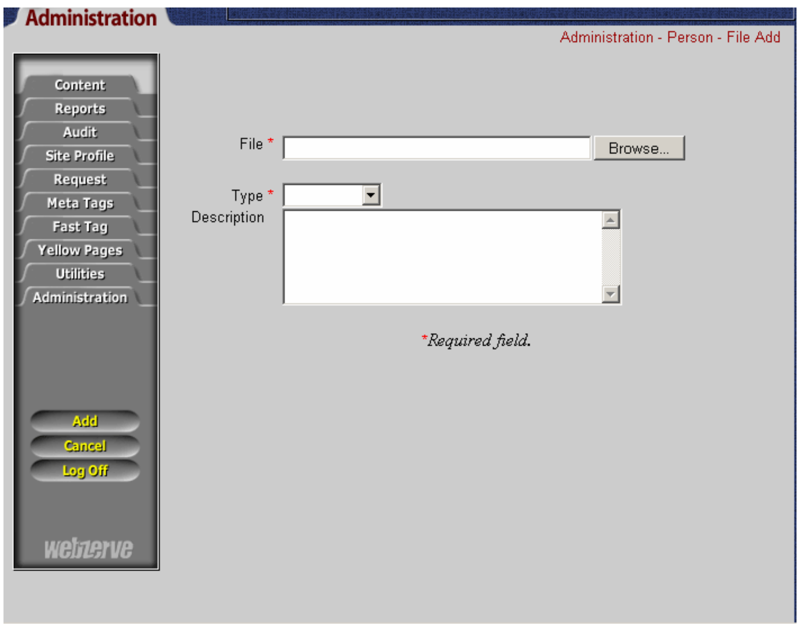


Figure 60 Person File add screen

File Update Screen
When you click the **File Update** button on the Update Person file **Figure 61** displays:
File: File is the name of the file you want to upload into the database. Click on the **Browse** button, a window will pop up. Select the file you want to upload from the popup window and click **Open**. The name of the file will be inserted into the File text box.
Type: Insert the type of file you are uploading. You have two choices in the dropdown list box, "PORTRAIT" and "BIO"

PORTRAIT: to upload a gif/jpg file and
BIO: to upload a .doc file.
Description: Insert a description of the file.
Add: Click **Add** to save your changes.
Cancel: Click **Cancel** to go back to the previous screen.
Log Off: To exit, click **Log Off**.

Announcement

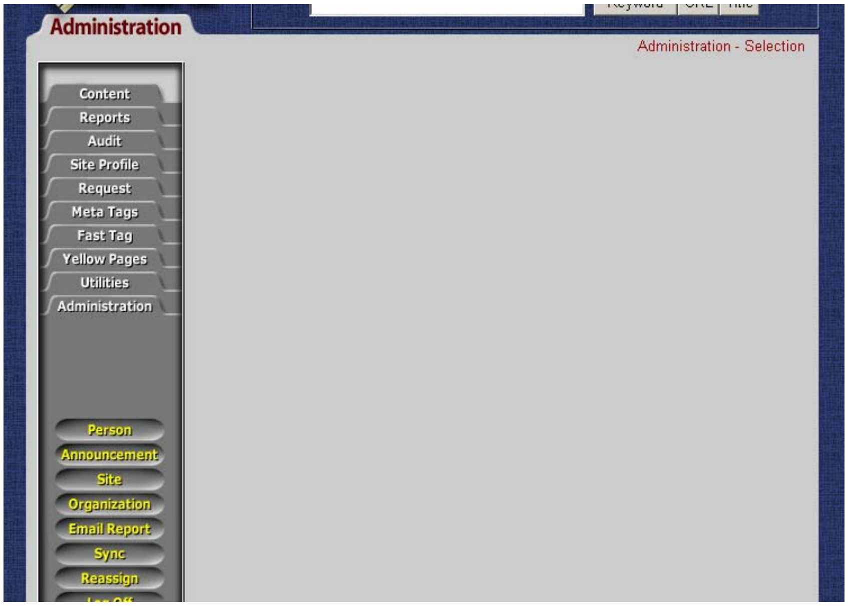
Webzerve allows Webmaster to post announcement thru Webzerve. The announcement is displayed on the first screen after user login, as displayed in the screen below. If there is more than one announcement posted by Webmaster all of them will be shown in descending order by creation date.

Web page search screen with announcement

Announcement - Add/Edit

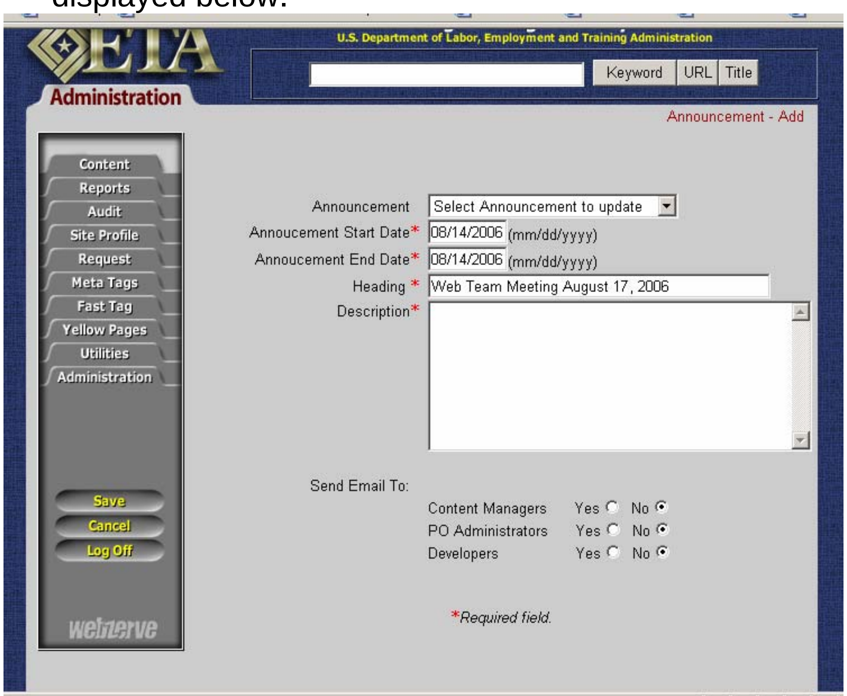
To add an announcement:

- Go to admin module by clicking Administration and see the following screen



Admin screen

- Click announcement button to go to announcement add/edit screen displayed below.



Announcement - add/edit screen

- The fields displayed in this screen are as follows:

- ***Announcement:*** This dropdown box lists all the current announcements. Webmaster can edit or delete an announcement from here. The list is sorted by the last announcement first. Select the desired announcement the page will refresh displaying corresponding information. Edit and click save. Information will be updated and selected users will be notified.
- ***Announcement Start Date****:* Announcement is displayed starting 1:00 a.m. from the start date. A calendar is displayed as you click in the text box for your convenience. Just click the desired date and the date will be inserted in the text box.
- ***Announcement End Date:*** Announcement is displayed until midnight 11:59 p.m. of End Date. End date can be same as start date. In this case the news will be displayed for just that single day. End date cannot be greater than start date.
- ***Heading:*** As the name suggests it is the title to the announcement. Heading is also displayed as a subject in the email that is sent out to the selected users when the announcement is saved.
- ***Description:*** This is the main body of your bulletin which is displayed as the user login and also as the body of the email send to selected users.
- ***3 Radio buttons:*** Email to Content Managers, POAdmin and Developers. By default “No” is selected. Select “Yes” for the user group where notification by email is required.
- **All the fields are required**.
- Upon saving this screen users are notified via email.

Announcement – Delete

- To delete an announcement just select the desired announcement from the dropdown list box and change the start and end date to the day before system date and click save.

Site

Site - Add/Update

Site Name: To update a site, select site name from the drop down list. (Figure 61) The page will refresh and take you to site update screen from the selected site. Refer to Figure 62 on next page.
Site Name: To add a new site, enter the name of the site.
Collection Name: Enter the name of the collection
Collection Location: Enter the location of the collection.
Log Location: Enter the location of the log.
Default Developer: Select the developer(s) from the list box. By default, this developer(s) will be automatically assigned to all pages within the site.
Default Content Manager: Select the Content Manager(s) from the drop down list. By default, this Content Manager(s) will be automatically assigned to all pages within the site.
Click **Add**

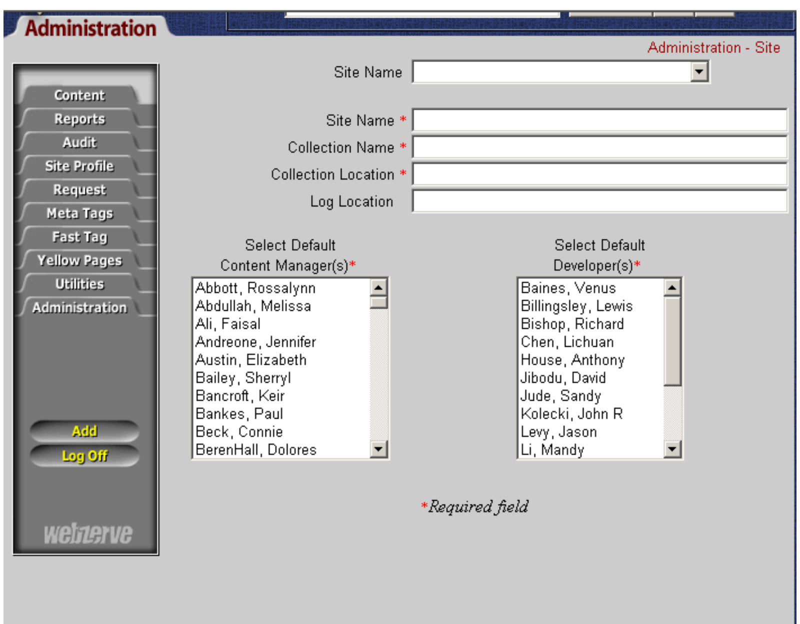


Figure 61 - Administration – Site

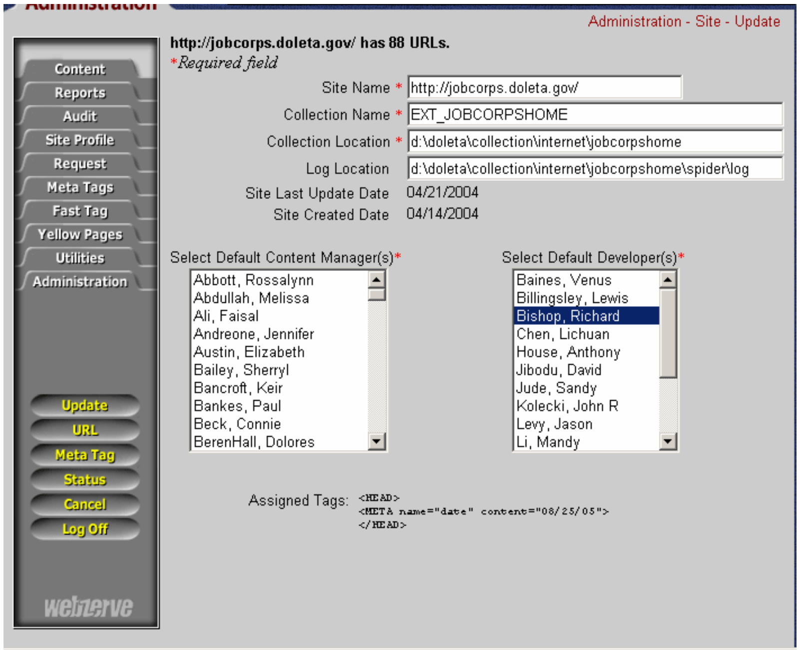


Figure 62 - site update screen

In the update screen user can update all the fields except the Site Name.

Organization – Add/Update

To add, update or delete an organization click organization in the Administration screen (figure 56). Following screen will be displayed. ***To add*** new organization insert organization and abbreviation and click **Add** button. ***To update*** an existing organization select the organization name from the dropdown list and then click update. The page will refresh. Make changes and again click **Update**.

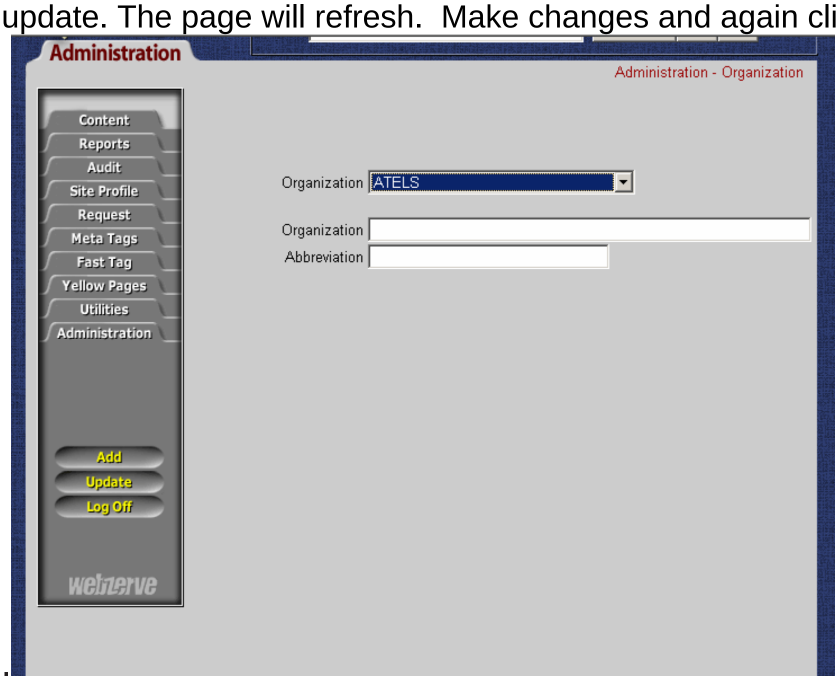


Figure 63 – Add and update organization.

Email

Administrator can email following reports to Content Managers or Developers thru the Webzerve application.

Next Review, Expiration or Lastmodified report

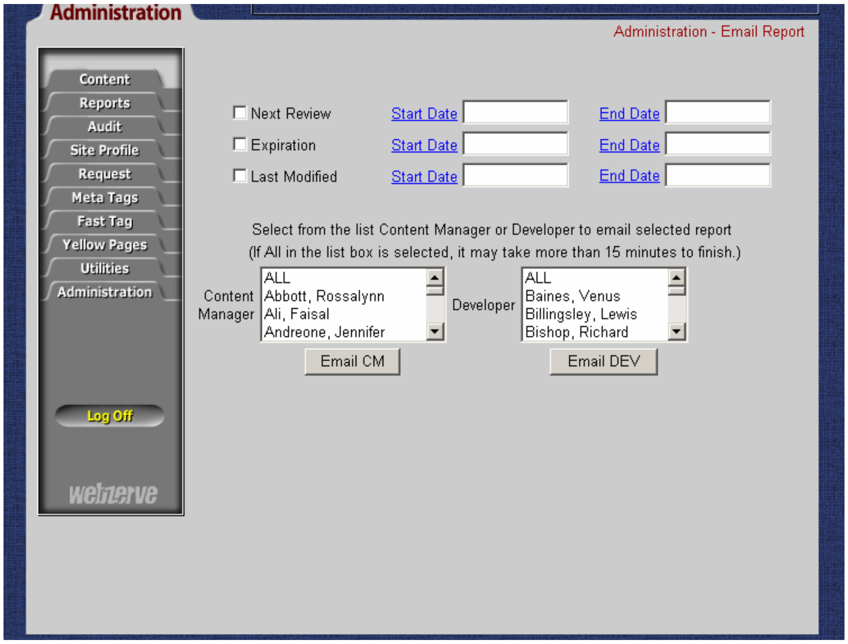


Figure 64 – Email reports

Synchronization

The process of synchronization performs an inventory match between files stored within the website database and those active on the website. Any new files added to the website are automatically added to the database. The match also monitors the status of the website, and provides a series of statistics on file changes and retentions.

To synchronize a ColdFusion database with a Verity collection, click on **Sync** in the Administration screen, as illustrated in **Figure 65**. Here you can synchronize the whole database or select a website to be synchronized. NOTE: Synchronization takes place every night thru the nightly process. Use this module only for special situations.

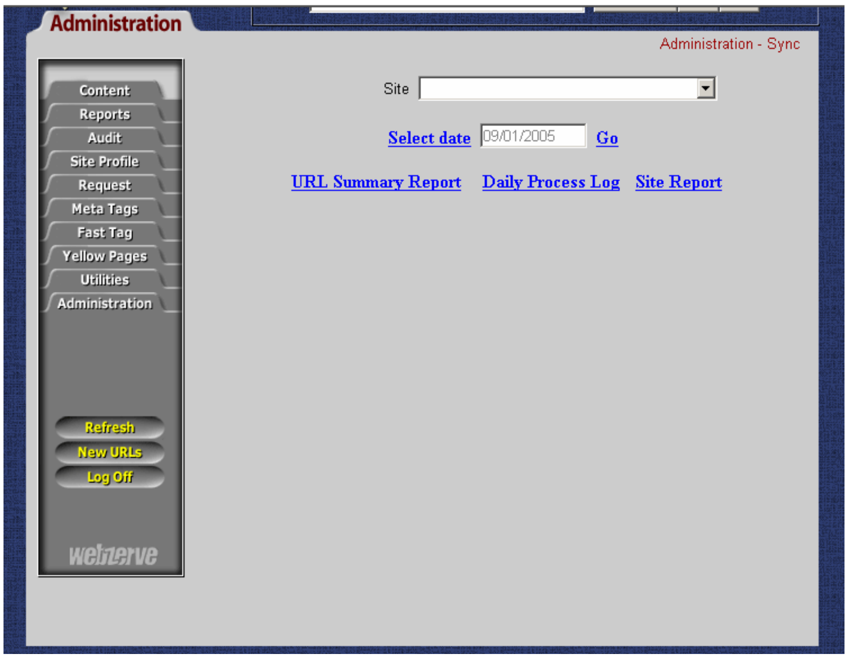
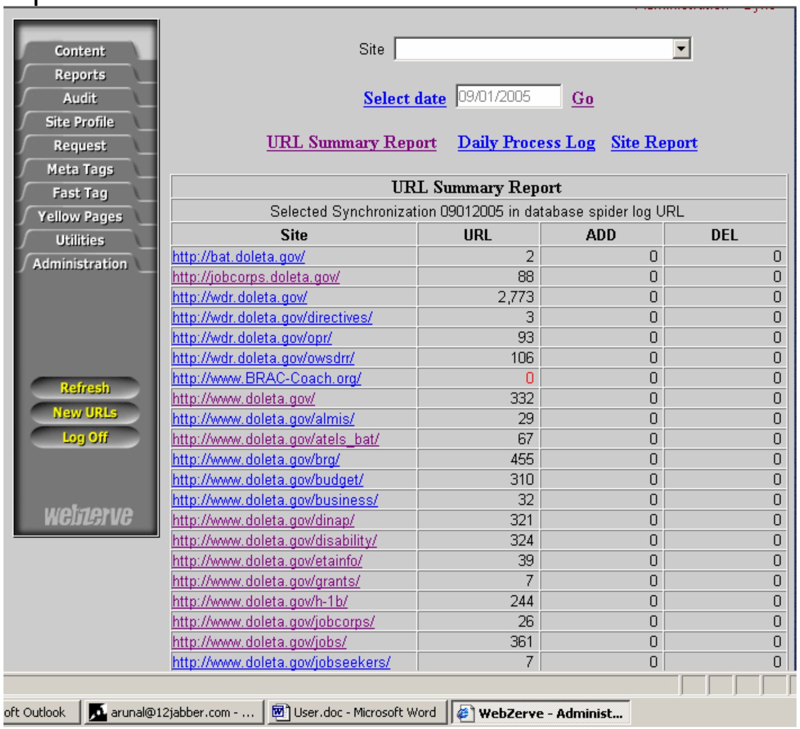


Figure 65 - Administration – Sync

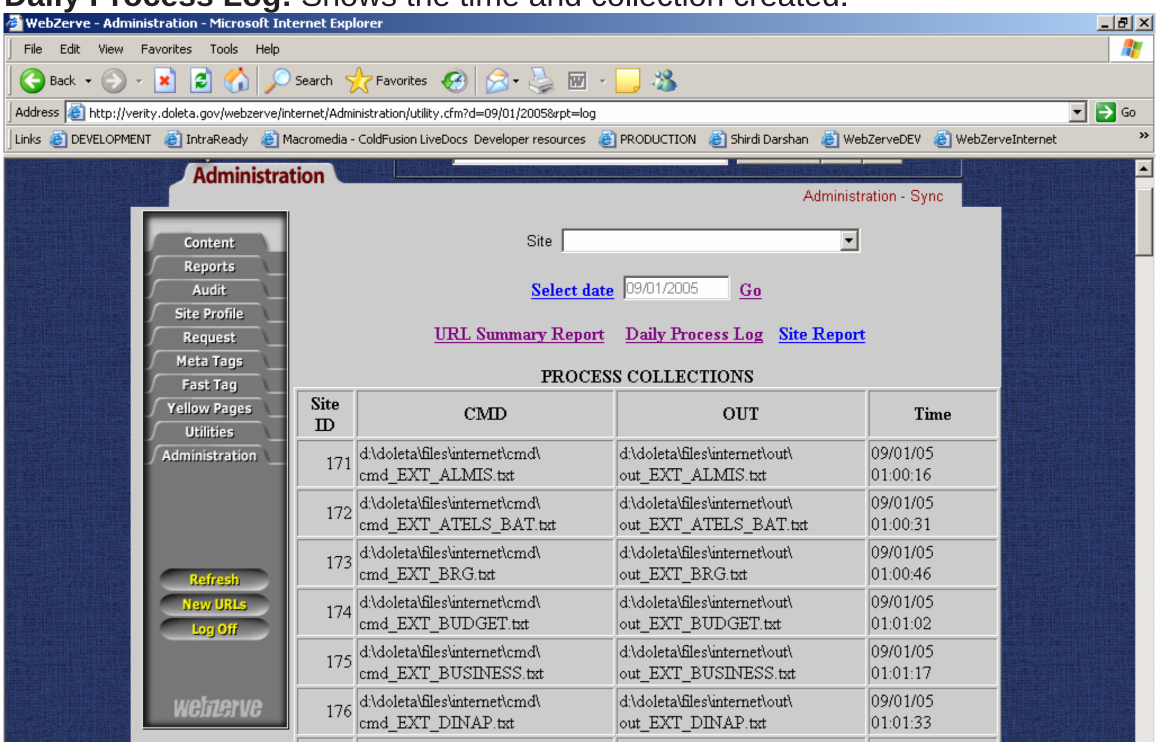
URL summary Report is displayed in figure 66. It shows the site name, number of urls in the site, how many new urls where added and deleted for the date the report is run.



Site	URL	ADD	DEL
http://bat.doleta.gov/	2	0	0
http://jobcorps.doleta.gov/	88	0	0
http://wdr.doleta.gov/	2,773	0	0
http://wdr.doleta.gov/directives/	3	0	0
http://wdr.doleta.gov/opr/	93	0	0
http://wdr.doleta.gov/owsdrr/	106	0	0
http://www.BRAC-Coach.org/	0	0	0
http://www.doleta.gov/	332	0	0
http://www.doleta.gov/almis/	29	0	0
http://www.doleta.gov/atels_bat/	67	0	0
http://www.doleta.gov/brg/	455	0	0
http://www.doleta.gov/budget/	310	0	0
http://www.doleta.gov/business/	32	0	0
http://www.doleta.gov/dinap/	321	0	0
http://www.doleta.gov/disability/	324	0	0
http://www.doleta.gov/etainfo/	39	0	0
http://www.doleta.gov/grants/	7	0	0
http://www.doleta.gov/h-1b/	244	0	0
http://www.doleta.gov/jobcorps/	26	0	0
http://www.doleta.gov/jobs/	361	0	0
http://www.doleta.gov/jobseekers/	7	0	0

Figure 66 - Administration – Sync (URL Summary Report)

Daily Process Log: Shows the time and collection created.



Site ID	CMD	OUT	Time
171	d:\doleta\files\internet\cmd\cmd_EXT_ALMIS.txt	d:\doleta\files\internet\out\out_EXT_ALMIS.txt	09/01/05 01:00:16
172	d:\doleta\files\internet\cmd\cmd_EXT_ATELS_BAT.txt	d:\doleta\files\internet\out\out_EXT_ATELS_BAT.txt	09/01/05 01:00:31
173	d:\doleta\files\internet\cmd\cmd_EXT_BRG.txt	d:\doleta\files\internet\out\out_EXT_BRG.txt	09/01/05 01:00:46
174	d:\doleta\files\internet\cmd\cmd_EXT_BUDGET.txt	d:\doleta\files\internet\out\out_EXT_BUDGET.txt	09/01/05 01:01:02
175	d:\doleta\files\internet\cmd\cmd_EXT_BUSINESS.txt	d:\doleta\files\internet\out\out_EXT_BUSINESS.txt	09/01/05 01:01:17
176	d:\doleta\files\internet\cmd\cmd_EXT_DINAP.txt	d:\doleta\files\internet\out\out_EXT_DINAP.txt	09/01/05 01:01:33

Figure 67 - Administration – Synch (Daily Process Log)

Refresh: The dropdown list indicates the list of websites that can be synchronized.
Select the site or select All (All Web Sites) and click **Refresh**. The Synchronization process will start. Do not interrupt the process while it is running.
New URLs: Click **New URLs** to display all the URLs added to the system since the last evaluation.

Reassign

Reassign screen is displayed as follows: From this screen one can reassign modules to a role. To display a module in the application put a check mark in front of the module for the particular role and click 'Save' button.

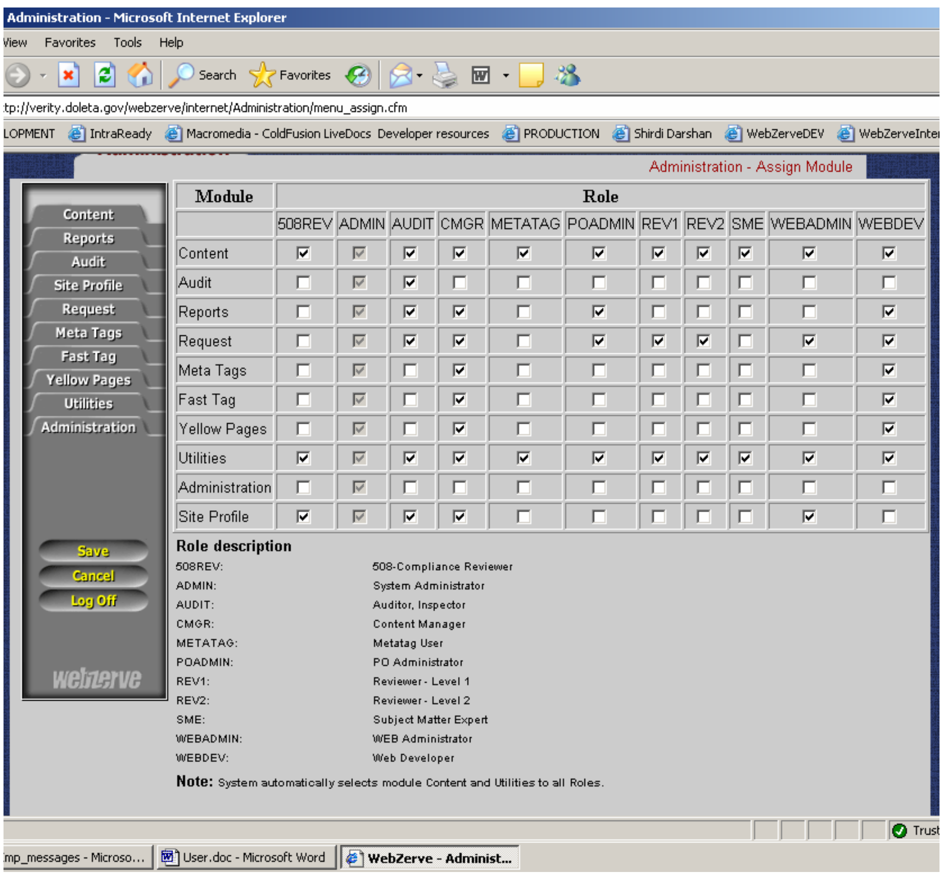


Figure 68 – Administration-Assign Module